

# User Guide

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### 1 Introduction

**About Dokmee Capture** 

**Quick Tour of Dokmee Capture** 

**Technical Assistance & Contacts** 

# 1.1 About Dokmee Capture

### What is Dokmee Capture?

Offering unlimited scanning with no per click charges, automated data capture options, and unmatched reporting and auditing tools, Dokmee Capture is the ideal product for scanning service bureaus, centralized scanning departments within large corporations, or companies looking to convert a large backlog of files.

Dokmee Capture provides users with the ability to separate the scanning, quality control, indexing, and exporting processes into independent tasks that can be performed simultaneously by different users, yet allowing centralized management of the entire process. It effectively transforms the scanning process into an assembly line that can be tailored to specific needs and carefully managed to maximize efficiency and minimize costs through the paper elimination journey. The built in reporting tool allows managers to track productivity and profitability automatically, eliminating the manual log process.

Image enhancement options are available as well as integration with image enhancement software from scanners with TWAIN and ISIS drivers. Editing tools and practical time saving shortcut options such as hot keys that are intuitive to use make the scanning and quality control process more efficient and accurate.

With the ability to setup recognition templates for typed text, barcodes, handwriting, checkboxes and more, Dokmee Capture provides the tools for time saving automated data extraction, which in turn leads to easy to find and retrieve electronic files. Dokmee Capture is able to push images and data into any document management or file sharing system, along with automatic file naming and folder creation and organization.

With all of these tools and features working together, Dokmee Capture effectively transforms the scanning process into an assembly line that can be tailored to specific needs and carefully managed to maximize efficiency and manage costs through the paper elimination journey.

Workflow modules can be completed on a single workstation or networked through multiple workstations at once, with different users working on different parts of the project simultaneously. Modules can be accessed onsite or offsite, parts of the project can be outsourced

or it can all be done in-house through production teams that complete single modules along the assembly line.

This is a top notch solution for streamlining the conversion from paper to searchable electronic files in a manner that saves both time and money.

### **Dokmee Capture Highlights**

- 15-Day Fully Functional FREE Trial
- Unlimited Scanning with No Per Click Charges
- Divide Tasks & Manage Workload
- Ensure Quality & Accuracy
- Automated Data Capture
- Process Load Balancing
- Centralized Batch Directory
- Understand ROI with state of the art reporting tool to help track productivity and profitability.
- One of a kind offsite indexing management module. Send and receive images and data to
  offsite locations for data entry and Dokmee Capture will make sure the proper data gets
  matched up with the appropriate scanned images upon completion.

# 1.2 Quick Tour of Dokmee Capture

Quick Tour Video

#### **Administrative Modules**

#### **Batch Directory**

Listing of all batches currently in the system.

#### **User Administration**

Create and manage user access to the system. Control access to specific modules, batch profiles, and batches.

#### **Batch Profile Administration**

Create and manage batch profiles with module routing specifications, index fields and

configuration, zone recognition templates, database lookup and index synchronization, batch name settings, document name configuration, automatic importing, automatic PDF bookmarks, export profiles, and more batch related settings.

#### **Reporting Tool**

Track productivity and profitability with automated reports that collect data such as scan feed count, image count, separator page count, QC page count, deleted page count, index character count, and exported page count. Automatic calculations are performed based on employee costs and charge backs to clients when Dokmee Capture is being used in a service bureau environment.

#### **Restore Batches**

Re-import deleted and exported batches for recovery or further processing. Index information and batch integrity is recovered upon restoration.

### **Process Workflow Modules**

#### Scan

Scan from any brand TWAIN or ISIS driver compatible scanner. Works with third party image enhancement driver software such as Kofax VRS, Kodak Perfect Page, Visioneer Acuity, Fijutsu Paperstream, and more. Insert images from a file system location as well. Automatic backside blank page removal and automatic image rotation available. Several automatic document separation options including barcode and text recognition.

#### **Import Files**

Import PDF, TIFF, JPEG, and BMP images from the file system. End user can import files using the Import Files module (mainly use to import large volume of files). There is also other import functionality (mainly used to append, replace or insert) in the scan module, Index module, and Quality Control Module. There is also an automatic import functionality when using the Active Import module from the batch profile.

#### **Blank Page Removal**

Post scanning blank page removal module to ensure that any unwanted blank pages captured during scan time are removed.

#### **Quality Control**

Thumbnail image display for quick and efficient verification of images. Hot key shortcut keys for common actions such as delete, image rotation, splitting and combining documents. Flag pages and documents with notes and comments.

#### **Batch Processing**

Runs in the background for zone recognition template processing and automatic full text OCR and export.

#### **Auto Processing**

Fully automated process from scan to export. Runs in the background for SC/AI (Scan/Active Import), BC (Zone Recognition), MI (Magic Indexing) and XP (Export).

#### **Magic Indexing**

Automate the Indexing process by the click of a button. Magic Indexing sends batches to a secure server, documents are indexed in an offsite location and index values are returned and auto populated in Dokmee Capture. The estimated indexing turnaround time is about 3 hours. The benefits of using this module are: productivity, indexing accuracy, automation, low cost, 24/7 indexing capabilities, no need for indexing staff, process low or high volume and hand writing indexing. Currently, Magic Indexing service is available in English, French, Spanish and Portuguese.

#### **Index Offsite**

Send documents to a network folder or FTP folder for indexing at an offsite location. Send the entire document or just the first page of each document. The batch stays in Batch Directory. Offsite indexing may be done with or without Dokmee Capture. Once offsite index is complete, import the index flat file and the information will automatically be synched with the proper documents in the system.

#### Index

#### Key from image

for manual indexing and database lookup processing. Verify automatic zone recognition and offsite index data. Create PDF bookmarks.

#### **Index Verification**

To allow users to have a double check option on indexes by having them go through the indexing process again but with checks on data mismatch

#### **QC Index**

Verify index information from imaging index module, automatic zone recognition, and offsite index. Find and replace functions for easy batch modifications. Easily find and verify index fields that may have been left blank. Update multiple fields with the same index data at one time.

#### **Export Files**

Prepare images and index data for importing into a document management system or for exporting to a network location. Automatically create multi-level folder structures using index

data. Choose the filename of documents based on index fields. Perform full text OCR with multi-language capabilities within the same document or on the same page. Customize and choose the flat file template or perform a direct upload to select network and online document management systems. Export images as TIFF, PDF, PDF/A, JPEG, BMP.

### **Configuration Modules**

#### **Connection Settings**

Control which SQL Server and Central Path the system is pointing to for easy networking of multiple Dokmee Capture stations.

#### **Optimize Database**

Cleanup and compress SQL database to remove empty data and unused files and information. Recommended every 6 months for optimal speed and performance.

#### **Manage Services**

Connect to Windows Services to access Dokmee Capture background services.

### 1.3 Technical Assistance & Contacts

#### **Contact Us**

Online Form

#### **Live Chat**

Do you need a quick solution to a technical problem?

Chat Now

# **Phone & Email Support**

#### **North America**

Email: support@dokmee.com

Phone: (832) 369-3900 Option 2

Toll Free: (866) 748-6464 Option 2

### **South America**

Email: support@dokmee.com

Brazil: +55 11 3010-0628 Option 2

Mexico: +52 55 8421 6783 Option 2

Colombia: 01800-518-2220 Option 2

### **Europe/Africa**

Email: support@dokmee.com

UK: +44 20 3239 0016

France: +33 1 40 39 10 39

Germany: +49 22411232994

Italy: +39 02 45557033

Russia: +7-499-5000482

#### Asia/Oceania

Email: support@dokmee.com

+65 3158 4760

#### Middle East

Email: support@dokmee.com

Bahrain: +973 36666143

Libya: +218 926831874

### 1.4 Online Resources & Documentation

Use the buttons below to link to valuable online resources for Dokmee Capture.

#### **Video Tutorials**

To view videos on how to use Dokmee Capture, click the button below and then select Dokmee Capture.

Video Tutorials

# **Frequently Asked Questions**

To view frequently asked questions, click the button below and look for Dokmee Capture.



### **Product Updates & Change Log**

To view the new features, improvements, and fixed issues in Dokmee Capture, click the button below and then select Dokmee Capture.

Change Log

### My Support Cases & Knowledge Base

To view the knowledge base or the status of your current open support tickets, click the button below and sign into your Office Gemini My Support Center account.

My Support Center

# 2 Licensing

**End User License Agreement** 

**License & Registration** 

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- 2. Notwithstanding the foregoing, Licensee's confidentiality obligations hereunder with respect

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- 3. Failure by either party to enforce any provision of this Agreement will not be deemed a waiver of future enforcement of that or any other provision.
- 4. If for any reason a court of competent jurisdiction finds any provision of this Agreement, or portion thereof, to be unenforceable, that provision of the Agreement will be enforced to the maximum extent permissible so as to affect the intent of the parties, and the remainder of this Agreement will continue in full force and effect.
- 5. The prevailing party in any action to enforce the Agreement shall be entitled to recover costs and expenses including, without limitation, reasonable attorneys' fees.
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# 2.2 License & Registration

Dokmee Capture installs with a fully functional 15-day trial license. During these 15 days you have complete access to all the areas and features of Dokmee Capture. Dokmee Capture comes in 2 different licensed versions: Standalone Edition and Network Edition. Both versions use the same installation file. Edition is determined by the license key.

You must be connected to the internet to activate or move a license key without the assistance of our support team.

#### How to Activate a License Key

- 1. Go to Help tab
- 2. Click on About
- 3. Click Deactivate, paste the license key
- 4. Click Activate

#### How to Move a License Key to a Different Machine

- 1. Go to Help tab
- 2. Click on About
- 3. Click Deactivate
- 4. Copy the License Key
- 5. You are now able to Activate your License Key on another machine

# 3 Installation & Configuration

**Hardware System Specifications** 

**Installing Dokmee Capture** 

**First Run Wizard** 

**Diamond Vision Migration Tool** 

**Updating Dokmee Capture** 

# 3.1 Hardware System Specifications

Click below to see the system requirements document for Dokmee Capture.

System Requirements

## 3.2 Installing Dokmee Capture

### **Prerequisites**

- .NET Framework 4.5
- SAP Crystal Reports (included with installer)
- SQL Server 2008+ Express or Standard (Capture Network: MS SQL no included with installer, Capture Standalone: Installs a localDB)

Only 1 SQL Server is required for Dokmee Capture Network Edition. For Standalone Edition, SQL localDB will be installed.

- How to Install Dokmee Capture
  - 1. Run the Dokmee Capture installer
  - 2. On the Welcome Screen, click Next
  - 3. Dokmee Capture will give you the option to install prerequisites
    - 3.1. SAP Crystal Reports
  - 4. Click Accept on the End User License Agreement
  - 5. Choose where to store the program files. By default, these will be stored in your Windows > Program Files folder. It is recommended that you keep this location.
  - 6. Dokmee Capture will install with an active 15 day trial key. Click Here to learn how to activate a permanent license key.
  - 7. Once installation is complete, the Frist Run Wizard will appear. Click Here to learn how to use the First Run Wizard.

# 3.3 Microsoft SQL Configuration

Dokmee Capture Network edition uses Microsoft SQL Server to store all meta data and program info related to working files. Dokmee Capture Enterprise is compatible with Microsoft SQL Server 2008 Express/Standard and higher. Dokmee Capture Standalone uses SQL LocalDB

It is suggested that the SQL Server be on a dedicated server with regular back-ups performed.

Dokmee Capture will auto-create all databases and tables needed in a new SQL instance.

To network multiple Dokmee Capture stations together, make sure to point all stations to the same SQL Server and database.

Dokmee Capture Standalone Edition, Microsoft SQL localDB must be locally on the same machine

as Dokmee Capture.

- How to Configure SQL Settings on a New Dokmee Capture Network
  - During the First Run Wizard, you will be asked to input desired SQL Server Credentials
  - 2. When connecting to SQL server, continue with the steps below
    - 2.1. Input the desired SQL Server location IP address or computer name in the Data Source field.
    - 2.2. Input the SQL Port. This is usually port 1433.
    - 2.3. Input valid system administrator login credentials for Microsoft SQL.
    - 2.4. Input the SQL Database name for the new Master Database for Dokmee Capture, or enter the name of an existing Master Database that was previously created to network to an existing Dokmee Capture network system.
  - 3. Click Next
- How to Change the SQL Settings on an Existing Dokmee Capture Network
  - 1. Go to Settings tab
  - 2. Select Connection Settings
  - 3. Input the desired SQL Server location IP address or computer name in the Data Source field.
  - 4. Input the SQL Port. This is usually port 1433.
  - 5. Input valid system administrator login credentials for Microsoft SQL.
  - 6. Input the SQL Database name for the new Master Database for Dokmee Capture, or enter the name of an existing Master Database that was previously created to network to an existing Dokmee Capture network system.
  - 7. Click Ok
- How to Move an Existing Dokmee Capture Database

Click here to learn about Dokmee Capture database migration

# 3.4 Central Path Configuration

The Central Path is a shared network folder where Dokmee Capture will store working files and images and any external files needed that are not stored in the SQL Server.

It is suggested that the Central Path be on a server with large disk space and regular back-ups performed.

Dokmee Capture will auto-create all sub-folders and files needed in a new Central Path once a location is selected.

To network multiple Dokmee Capture stations together, make sure to point all stations to the same Central Path.

- How to Setup the Central Path on a New Dokmee Capture Install
  - 1. During the First Run Wizard, you will be asked to select the location for the Central Path
    - 1.1. We recommend creating a folder on the root of the 'C' Drive and naming it 'Dokmee Capture Central Path'
  - 2. Select the desired Central Path location in the Central Path Location field
  - 3. Click Next
- How to Change the Central Path on an Existing Dokmee Capture Install
  - 1. Go to Settings tab
  - 2. Select Connection Settings
  - 3. Select the desired Central Path location in the Central Path field
  - 4. Click Ok
- How to Move an Existing Central Path
  - 1. Browse to the Central Path location in Windows. To figure out where your Central Path is located, go to Settings tab > Connection Settings.
  - 2. Copy the main root folder
  - 3. Paste the folder into the new location
  - 4. Make sure to point each Dokmee Capture workstation on the network to the new Central Path location
  - 5. See 'How to Change the Central Path on an Existing Install' instructions above to

complete this action

#### 3.4.1 Central Path Batches Folder

This folder stores all of the current working and in-progress batches on the Dokmee Capture System. Only administrators and expert IT users should access this folder.

DO NOT move, rename, alter, or delete any files or items from this folder or Batches in Dokmee Capture will become corrupt.

### 3.4.2 Central Path ConfigFiles Folder

This folder stores all of the configuration, backup and database linking information within the Dokmee Capture System. Only administrators and expert IT users should access this folder.

DO NOT move, rename, alter, or delete any files or items from this folder or Batch Profiles and Batches in Dokmee Capture will become corrupt.

#### 3.4.3 Central Path Deleted Folder

This folder stores all of the batches that have been deleted from the Dokmee Capture System. Only administrators and expert IT users should access this folder.

It is recommended that you clean out this folder every 3-6 months to save storage space on the Central Path. Batches from this folder may be stored in an archive folder or on an external hard drive. If items are moved from this folder, it will not affect the working Dokmee Capture system.

The Restore Batches feature uses this Central Path folder as a directory to import and recover Deleted batches.

#### 3.4.4 Central Path Exported Folder

This folder stores all of the batches that have been exported from the Dokmee Capture System. Only administrators and expert IT users should access this folder.

It is recommended that you clean out this folder every 3-6 months to save storage space on the Central Path. Batches from this folder may be stored in an archive folder or on an external hard drive. If items are moved from this folder, it will not affect the working Dokmee Capture system.

The Restore Batches feature uses this Central Path folder as a directory to import and restore Exported batches.

### 3.4.5 Central Path Ready to Import Folder

This folder is where you should store all of the index flat files from Offsite Index processing. Only administrators and expert IT users should access this folder.

The Offsite Index feature uses this Central Path folder as a directory to import index information

that has been previously sent from the system for off premise data entry.

### 3.4.6 Central Path Ready to Index Folder

This folder is where Dokmee Capture stores all of the batches sent for Offsite Index processing. Only administrators and expert IT users should access this folder.

The Offsite Index feature uses this Central Path folder as a directory as an export path for all batches sent from the system for off premise data entry.

#### 3.5 First Run Wizard

The First Run wizard will guide you through the initial setup of Dokmee Capture and configure your system as necessary.

- How to Configure the Back-End Database Setup
  - 1. If you allowed Dokmee Capture install SQL for you, click Next
    - 1.1. The installer auto fills the data with the proper settings configured automatically during the install
    - 1.2. "sa" default password is "@password1"
  - 2. If you are connecting to a different SQL server, continue with the steps below
    - 2.1. Input the desired SQL Server location IP address or computer name in the Data Source field.
    - 2.2. Input the SQL Port. This is usually port 1433.
    - 2.3. Input valid system administrator login credentials for Microsoft SQL.
    - 2.4. Input the SQL Database name for the new Master Database for Dokmee Capture, or enter the name of an existing Master Database that was previously created to network to an existing Dokmee Capture network system.
  - 3. Click Next
  - 4. See below to complete the Central Path Setup within the First Run Wizard.

Click Here to learn more about SQL Settings.

How to Complete the Central Path Setup

The Central Path is the Windows folder location where images, batches, and configuration files will be stored for Dokmee Capture.

1. We recommend creating a folder on the root of the 'C' Drive and naming it 'Dokmee

Capture Central Path'

- 2. Select the desired Central Path location in the Central Path Location field
- 3. Click Next
- 4. See below to complete the Administrator Account Setup within the First Run Wizard.

Click Here to learn more about the Central Path.

#### How to Complete the Administrator Account Setup

- 1. Dokmee Capture contains one main Administrator account that cannot be removed from the system: 'admin'
- 2. Enter a password for the 'admin' account
- 3. Confirm the password
- 4. Click Next
- 5. See below to complete the Batch Profile Setup within the First Run Wizard.

Click Here to learn how to create other user accounts in the system.

#### How to Complete the Batch Profile Setup

During the First Run Wizard, you may select the sample Batch Profiles to look at and use, or you may create your own Batch Profile and add your first batch to the system.

- 1. On the Batch Profile Setup screen, select the option "Create Batch Profile now"
- 2. Click Next
- 3. Enter the 'Profile Name'.
  - 3.1. This will be used to identify and select the profile in the system.
- 4. Add the Index fields one at a time using the 'Add Field' button.
- 5. Set the 'Field Type' for each index field. The field types listed in the First Run Wizard are limited.
  - 5.1. For more advanced field types or for automated Zone Recognition, you may edit the profile in the Batch Profile Administration section of the program once you have finished the First Run Wizard. Click Here to learn more about Index Field Settings.
- 6. Click Next

- 7. Choose which modules and the order they should be followed for the new profile.
  - 7.1. Click Here to learn more about Batch Progression Settings.
- 8. Click Next
- 9. Set the automatic Batch Name and Filename settings or leave blank if you wish to use the defaults.
  - 9.1. Click Here to learn more about Batch Name Settings.
  - 9.2. Click Here to learn more about Filename Settings.
- 10. Click Next
- 11. Type the Batch Name and Batch Number for the first batch in the system.
  - 11.1. All scanned and imported images are managed in batches. Batches are groupings of similar files. Typically a box of paperwork is considered 1 batch.
- 12. Click Next
- 13. Verify all of the information on the summary screen of the First Run Wizard.
- 14. Click Finish

# 3.6 Diamond Vision Migration

This migration tool is used to convert old Diamond Vision systems into Dokmee Capture.

- How to Use the Migration Tool
  - 1. Go to Help tab
  - 2. Select DV Migration
  - 3. Input Diamond Vision source information for SQL and Central Path
  - 4. Click Next
  - 5. Verify that the Dokmee Capture SQL and Central Path destination information is correct
  - 6. Click Finish
  - 7. The migration will begin

### What is migrated over?

- User Profiles
- Reporting Tool Data
- Index Profiles / Batch Profiles
  - Index Field Settings
  - o Barcode/OCR Recognition Templates
  - PDF Bookmark Settings
  - Database Validation Settings
  - Export Settings Templates
  - Offsite Index Settings
  - Batch Progression Settings
  - Active Import Settings
  - Batch Name Settings

### What is NOT migrated over?

- Diamond Vision Migration Tool does not import active batches currently listed in Batch Directory
- Diamond Vision Migration Tool does not import data from the Central Path folders: Batches,
  Deleted, Exported, Ready to Import, Ready to Index. To convert this data, simply copy and paste
  the contents of each folder from your Diamond Vision Central Path into your Dokmee Capture
  Central Path.

# 3.7 Dokmee Capture Migration

Dokmee Capture 5 Network, Dokmee Capture 6 Network and Dokmee Capture 5 Standalone uses MSSQL Database. Dokmee Capture 6 Standalone uses LocalDB.

How to Migrate Dokmee Capture Network SQL Database Only

\* If using Dokmee Capture Network (version 5 or 6) follow this steps:

#### 1. Steps to perform on the old server:

1. Open Microsoft SQL Server Management Studio

- 2. Expand the Databases folder
- 3. Select all of the Databases that start with "DokmeeCapture"
- 4. Right Click and choose Select Tasks > Detach (make sure all "DokmeeCapture" items are selected)
- 5. Copy the SQL files (ALL mdf and ldf files that start with "DokmeeCapture") to an external drive or directly to the new server
  - 5.1. The location may be different on different computers, "C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data"

#### Steps to perform on the new server:

- 1. Paste the SQL Database files to the SQL server data folder
  - 1.1. Should be similar to this location: "C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data"
- 2. Open Microsoft SQL Server Management Studio
- 3. Right Click on the 'Databases' folder and select Attach
- 4. Click Add
- 5. Select the "DokmeeCapture.mdf"
- 6. Click Ok
- \*Make sure to point to the new SQL server in the Connection Settings area of each Dokmee Capture Workstation.
- \* You can also migrate the Dokmee Capture database by performing a backup of the Dokmee Capture Network database and then restoring the database in the new computer using Management Studio
- + How to Migrate Dokmee Capture Standalone/Network Central Path Only
  - 1. Locate the existing Dokmee Capture settings. From the Dokmee Capture Home screen click "Connection Settings" or from the Dokmee Capture login screen click "Options". Take note of the "Central Path"
  - 2. Copy all the content from the Dokmee Capture Central Path (Include the parent directory)
  - 3. Paste the Dokmee Capture central path into the desired new location

- 4. Using Dokmee Capture connections settings point to the new Central Path location
- \* The new central path location must have read and write permissions
- + How to Migrate Dokmee Capture 5 Network Software Only
  - \* The following instructions migrate the Capture 5 software to a new computer
  - From the old computer, Copy the SQL Server Connection Information, you will need them later when installing Capture Network in the new computer. From Dokmee Capture login Screen > click Options > Take note of all the connections settings, ask your SQL database administrator for the SQL password. The default SQL password for Dokmee Capture is @password1
  - Deactivate and Copy the Dokmee Capture license from the old computer. Login to Dokmee Capture Network> Help>About>click Deactivate> copy the license and store it securely
  - 3. Download the Dokmee Capture installer in the new computer or to a network drive
  - 4. Run the installer as administrator
  - 5. Follow the installation Wizard. At the first run wizard provide the connections settings you collected in step 1
  - 6. Activate the Capture Network license collected in step 2 on the new computer. Click Here to learn how to activate a permanent license key
- + How to Migrate Dokmee Capture 5 Standalone to a New Computer. Migrating: Database, Central path and Dokmee Capture Software.
  - \* If migrating Dokmee Capture Standalone version you will need to migrate the SQL database and the Dokmee Capture software, central path can be in the same location if needed or it can be migrated too
  - 1. Make a backup copy of the SQL database
  - 2. If moving Dokmee Capture Central Path to the new location make a backup copy of the central path **or** move it to the new location.
  - 3. Deactivate and Copy the Dokmee Capture license from the old computer. Login to Capture Network> Help>About>click Deactivate and then copy the license, store it for later use

- 4. On the new computer, Download the Dokmee Capture 5 installer
- \* If SQL server is already installed on the new computer follow these steps:
- If not using the old Dokmee Capture Central Path location, copy and pasted the Dokmee Capture central path that was backup in step 2 to the new Central Path location
- ii. On the new computer, restore the SQL backup and if the central path is needed to be moved to the new location paste it in the new Central Path location
- iii.Run the Dokmee Capture 5 standalone installer as Administrator
- iv. Follow the Dokmee Capture installer wizard
- v. Once at the Dokmee Capture first run wizard, provide the Dokmee Capture Connection Settings.
- vi. Login to Dokmee Capture using existing admin Credential
- vii. Activate the Dokmee Capture License collected in step 3. Here to learn how to activate a permanent license key.
- \* if SQL server is not installed on the new computer follow these steps:
- 5. If not using the old Dokmee Capture Central Path location, copy and pasted the Dokmee Capture central path that was backup in step 2 to the new Central Path location
- ii. 6. Run the Dokmee Capture 5 standalone installer as Administrator
- iii.The Dokmee Capture 5 Standalone installer comes with SQL 2008 server, installed it if you need it **or** install another version of SQL server
- iv. Follow the Dokmee Capture installer wizard
- v. Once Dokmee Capture Standalone is installed and DokmeeCapture is at the First Run Wizard, restore the Dokmee Capture Backup performed in step 2. At this step the SQL database must be already installed.
- vi. Once Dokmee Capture is in the First Run Wizard, provide the Dokmee Capture Connection Settings.
- vii.Login to Dokmee Capture using existing user Credential
- viii. Activate the Dokmee Capture License collected in step 3. Here to learn how to activate a permanent license key.

# 3.8 Updating Dokmee Capture

Updating Dokmee Capture is done through Check for Updates from the Help menu.

You must be on a valid Annual Maintenance Plan (AMP) to receive product updates.

#### How to Update Dokmee Capture

- 1. Go to Help tab
- 2. Click Check Updates and click Check Now
- 3. Click 'Yes' to download the installer
- 4. 'Run' the installer once download completes
- 5. No data or settings will be lost during an update

#### How to Turn Automatic Updates On / Off

- 1. Go to Help tab
- 2. Select Check for Updates
- 3. In the drop down, you may turn Auto Updates On or Off
- \*When the green check mark is visible, automatic updates are turned on. A check for updates will be performed upon login to Dokmee Capture when the PC is connected to the internet

#### How to Upgrade Dokmee Capture 5 Network to Dokmee Capture 6 Network

- 1. There are some important tips when upgrading Dokmee Capture 5 Network to Dokmee Capture 6 Network:
- \* Dokmee Capture 6 Network connects to the same SQL Database and Central Path than Dokmee Capture 5 Network. Because it is a major Upgrade with new modules/functionalities, the Capture 6 Network installer will update the SQL Database; therefore, Capture 5 Network cannot connect once the SQL database was updated to support version 6 only
- \* Dokmee Capture 5 Network license will not work for the Dokmee Capture 6 Network

\* All the other workstations need to be upgraded

To upgrade Dokmee Capture 5 network to version 6 Network follow these procedures:

- 1. It is recommended to backup the Dokmee Capture SQL database and central path
- 2. Uninstall Dokmee Capture Version 5 using the 'Uninstall' functionality within Windows Control Panel
- 3. Download the Dokmee Capture Version 6 installer
- 4. Run the installer as administrator
- 5. Continue with the installation wizard
- 6. At the first run wizard provide the connection settings to connect to the existing Dokmee Capture database and central path. The Dokmee Capture 6 Network installer will update the existing Dokmee Capture 5 Database
- How to Upgrade Dokmee Capture 5 Standalone to Dokmee Capture 6 Standalone
  - 1. There are some important tips when upgrading Dkmee Capture 5 Standalone to Dokmee Capture 6 Standalone:
  - \* Dokmee Capture 6 Standalone will use a LocalDB; therefore, it will not connect to the same Dokmee Capture 5 Standalone SQL database. In order to keep all the setting from Dokmee Capture 5 Standalone to Dokmee Capture 6 Standalone the database need to be migrated from SQL Server to localDB, the Dokmee capture central path will stay the same.
  - \* Dokmee Capture 5 Standalone license will not work on Dokmee Capture 6 Standalone

Follow the following steps to upgrade Dokmee Capture Standalone

- 1. Backup the Dokmee Capture 5 Standalone SQL database Using SQL Management Studio
- 2. Uninstall Dokmee Capture Version 5 using the 'Uninstall' functionality within Windows Control Panel
- 3. Download the Dokmee Capture 6 standalone installer
- 4. Run the installer as administrator
- 5. Continue with the installation wizard
- 6. The Capture 6 Standalone installer will create a Dokmee Capture Standalone localDB

in the following path: "%LOCALAPPDATA%\Microsoft\Microsoft SQL Server Local DB\Instances\DokmeeCapture"

- 7. Connect to localDB using SQL Management Studio. Server name: (localdb) \DokmeeCapture Use: Windows Authentication
- 8. Using SQL Management Studio, Restore (to the localDB) the Dokmee Capture Standalone SQL database that was backup in step 1
- 9. Close and open Dokmee Capture Standalone, login with existing credentials

# 4 How to Use Dokmee Capture

**Login & Logout** 

**Change Password** 

**Display Language** 

**Connection Settings** 

**Home Screen** 

**User Administration** 

**Batch Profile Administration** 

**Reporting Tool** 

**Batch Directory** 

**Batch Validation Settings & Easy Buttons** 

**Import Module** 

**Scan Module** 

**Quality Control Module** 

**Batch Processing Module** 

**Blank Page Removal** 

**Index Module** 

**Offsite Indexing** 

**QC Index Module** 

**Export Module** 

**Change Batch Profile** 

**Restore Batches** 

**Database Optimization** 

**Manage Services** 

# 4.1 Login & Logout

- How to Login to Dokmee Capture
  - 1. Double click the Dokmee Capture icon on your Desktop or in your Programs list to open the Login screen.
  - 2. Enter your Username and Password to and press the arrow button to login.
- How to Logout of Dokmee Capture
  - 1. Go to File tab
  - 2. Select Logout
  - 3. The current user will be logged out of the system and the Login screen will appear.
- How to Close the Dokmee Capture Program

1. Click the 'X' Close Window button in the window navigation bar.

OR

- 1. Go to File tab
- 2. Select Exit

# 4.2 Change Password

- How to Change the Current Logged in User's Password
  - 1. Go to Help tab
  - 2. Select Change Password
  - 3. Enter your current password
  - 4. Enter the new password
  - 5. Confirm the new password
  - 6. Click Ok

System Administrators may change user passwords through the User Administration Module.

# 4.3 Display Language

# **Multi Language Interface Support**

- English
- French
- Deutsch
- Spanish
- Italian
- Portuguese
- Russian
- Bahasa Malaysia
- Bahasa Indonesia

- Chinese
- Thai
- Vietnamese
- How to Change the Interface Display Language
  - 1. Go to Settings tab
  - 2. Select Language Selection
  - 3. Choose the display language
  - \*Dokmee Capture will need to restart in order for the new language to display.

# 4.4 Connection Settings

Click Here to learn how to configure SQL Settings.

Click Here to learn more about Central Path.

# 4.5 Scanner Selection & Settings

Dokmee Capture is compatible with most TWAIN and ISIS driver scanners, and is not brand specific. Click below to see a list of scanners that have been tested and certified with Dokmee Capture.

**Certified Scanners** 

How to Select a Scanner

Scanner selection is available from the specific module tab within all modules where scanning is allowed: Scan, Quality Control and Zone Recognition Setup.

- 1. Go to Scan or Quality Control tab
- 2. Click Select Scanner
- 3. The list will show all ISIS and TWAIN driver scanners installed on the computer
- 4. Select a scanner from the list
- \*Make sure that the scanner is connected to the computer and turned ON, or the software will not be able to establish a connection to the scanner.

\* Application restart is required to switch between ISIS and TWAIN driver scanners.

#### How to Setup Scan Settings

- 1. Go to Scan or Quality Control tab
- 2. Click Scan Settings
- 3. Click the 'Advanced...' button to modify individual driver settings for the scanner.

\*The Advanced settings are different for each brand and model scanner and are dependent upon the scanner driver.

#### How to Setup Automatic Blank Page Removal

Scan Settings are available from the Scan tab within all modules where scanning is allowed: Scan, Quality Control and Zone Recognition Setup.

- 1. Go to Scan or Quality Control tab
- 2. Click Scan Settings
- 3. Check the 'Delete Blank Back Sides' box
- 4. In the Threshold box, type the amount of bytes per page that they system should look for to determine if the page is blank or contains information
  - 4.1. All even numbered back side pages smaller than the set byte size will be automatically removed from the system at scan time

\*Tip: If you are not sure what amount to set for threshold, scan a few blank pages at the DPI and color mode of choice and look at the average page size of the blank pages on the bottom status bar of the scan module while the page is in the image viewer.

# 4.6 Shorcut Keys

There are several shortcut keys / hot keys available to make document and page navigation and manipulation easier and faster within the Scan and Quality Control Modules.

| <u>Function</u> | Keyboard<br>Shortcut |
|-----------------|----------------------|
| Rotate Right    | ]                    |

| <u>Function</u>       | Keyboard<br>Shortcut |
|-----------------------|----------------------|
| Rotate Left           | [                    |
| Delete                | Del                  |
| Un-Delete             | \                    |
| Recover Deleted Pages | U                    |
| Flag                  | ;                    |
| Un-Flag               | ı                    |
| Insert                | Ins                  |
| Append                | Α                    |
| Replace               | R                    |
| Split                 | S                    |
| Combine               | С                    |

## 4.7 Home Screen

The Dokmee Capture Home Screen is the main control panel and source center for all modules and functions that are performed in the system. The Home Screen will appear when users first login to the system and when there are no batches or modules open in the system.

#### How to Navigate to the Home Screen

- 1. Go to File tab
- 2. Select Home

\*When navigating to the Home Screen, current working modules will remain open in the background and will be accessible through the Program Status Bar at the bottom of the screen.

# 4.8 Program Status Bar

The Program Status Bar displays all open windows, modules, and batches on the station.

When multiple modules are open on a station, quick links to those open items will appear in the Program Status Bar.

<sup>\*</sup>You can get back to the Home Screen from anywhere in the application.

Only 1 manually working batch (Scan, Quality Control, Index and QC Index) can be open at a time on a station.

### 4.9 User Administration

System Administrators have full control over creating and managing all user profiles in the system and are able to restrict module, batch profile, and batch access.

Click Here to learn how to tie User Profiles into the Reporting Tool for helpful performance and Profit & Loss reports.

#### How to Create a New User

- 1. Go to Home Screen
- 2. Select User Administration
- 3. Click New
- 4. Input the new user information
  - 4.1. Click Here to learn more about the General tab
  - 4.2. Click Here to learn more about the Status tab
  - 4.3. Click Here to learn more about the Module Restrictions tab
  - 4.4. Click Here to learn more about the Profile Restrictions tab
  - 4.5. Click Here to learn more about the Batch Restrictions tab
- 5. Click Ok
- 6. The new user will appear in the User Administration panel

#### How to Edit an Existing User

- 1. Go to Home Screen
- 2. Select User Administration
- 3. Select the user you wish to modify
- 4. Click Edit
- 5. Modify the user information
  - 5.1. Click Here to learn more about the General tab
  - 5.2. Click Here to learn more about the Status tab

- 5.3. Click Here to learn more about the Module Restrictions tab
- 5.4. Click Here to learn more about the Profile Restrictions tab
- 5.5. Click Here to learn more about the Batch Restrictions tab
- 6. Click Ok
- 7. The user information will be saved

#### How to Delete a User

- 1. Go to Home Screen
- 2. Select User Administration
- 3. Select the user you wish to delete
- 4. Click Delete
- 5. A confirmation message will appear, click Yes to delete
- 6. The user will be removed from the system

\*When a user is deleted from the system, their activity is still available and searchable in the Reporting Tool.

# 4.9.1 General User Settings

The General tab allows administrators to manage basic user information.

User ID

This is the username that will be used to login to Dokmee Capture.

**First Name** 

User's first name.

**Last Name** 

User's last name.

**Password** 

This is where you assign or change a user's password as an administrator.

Click Here to learn how users can change their own passwords.

#### Cost per Hour

Amounts are in USD.

This is used for the Reporting Tool.

Incorporates the user hourly wage into the profit and loss reports so that you can track how much you are spending on production.

When an hourly wage is modified, the history is tracked so that reports for older dates are using accurate wage information.

#### **Profile Gender and Picture**

Personalize user profiles by selecting the gender and uploading a photo.

You may also use the default gender icons provided.

#### 4.9.2 User Status Level

The Status section allows administrators to choose user access levels within the system.

#### **Admin Users**

By default, Admin users have full access to the entire Dokmee Capture system.

#### **User Administration**

If checked, the user **will** have access to the User Administration module to create, modify, and delete users.

If unchecked, the user will not have access to the User Administration module.

#### **Batch Profile Administration**

If checked, the user **will** have access to the Batch Profile administration module to create, modify, and delete batch profiles.

If unchecked, the user will not have access to the Batch Profile administration module.

### Reporting

If checked, the user **will** have access to the Reporting Tool to generate, view, and export system activity reports.

If unchecked, the user **will not** have access to the Reporting Tool.

# **Employee Users**

By default, Employee users have limited access to the Dokmee Capture system. To give users access to modules such as User Administration, Batch Profile Administration, and the Reporting Tool, make sure that the user is an Admin and not an Employee.

#### Allow user to create a batch

If checked, the user will be allowed to create new batches in the Batch Directory.

If unchecked, the user **will not** be allowed to create new batches, but they will be allowed to work on existing batches in the system created by other users.

Click Here to learn how to restrict users from accessing specific batches.

Click Here to learn how to limit which batches users can work on based on the Batch Profile it is assigned to.

#### Allow user to delete a batch

If checked, the user will be allowed to delete batches from the system in the Batch Directory.

If unchecked, the user will not be allowed to delete batches from the system.

\*All deleted batches go to a recycle bin folder in the Central Path called Deleted.

### Allow user to unlock a batch

If checked, the user **will** be allowed to unlock batches in the Batch Directory.

If unchecked, the user will not be allowed to delete batches from the system.

\*Unlocking batches is used when a batch becomes stuck in the "In Progress" Status. Click Here to learn more about unlocking batches.

#### 4.9.3 User Module Restrictions

The Module Restrictions section allows administrators to manage user access to each module individually.

By default, users have access to all Modules.

#### How to Edit Module Restrictions

- 1. Check each module that the user should be allowed access to
- 2. The QC Index Module has 2 modes: Full Access and Read Only
  - 2.1. Full Access mode gives the user rights to update index values as well as rotate

pages and delete documents

- 2.2. Read Only mode gives the user rights to update index values only, and not edit documents
- 3. Click Apply

\*When a module has been restricted, users will not be able to process batches within that module.

### 4.9.4 User Batch Profile Restrictions

The Profile Restrictions section allows administrators to manage access to each batch profile for each user individually.

By default, users have access to all Batch Profiles.

- How to Edit Batch Profile Restrictions
  - 1. To restrict specific Batch Profiles from a user, select a profile from the Available Profiles list and using the arrows move it to the Restricted Profiles list
  - 2. Click Apply

\*Users will not be able to process batches assigned to the Batch Profiles within the Restricted Profiles list

#### 4.9.5 User Batch Restrictions

The Batch Restrictions section allows administrators to manage user access to different batches individually.

By default, users have access to all Batches.

- How to Edit Batch Restrictions
  - 1. To restrict specific Batches from a user, select a batch from the Available Batches list and using the arrows move it to the Restricted Batches list
  - 2. Click Apply

\*Users will not be able to process batches within the Restricted Batches list

## 4.10 Batch Profile Administration

Create and manage batch profiles with module routing specifications, index fields and configuration, zone recognition templates, database lookup and index synchronization, batch name settings, document name configuration, automatic importing, automatic PDF bookmarks, export profiles, and more batch related settings.

#### How to Create a New Batch Profile

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Click New
- 4. Input the Profile Name
- 5. Click Create
- 6. Configure the Batch Profile settings
  - 6.1. Click Here to learn more about the Index Fields tab
  - 6.2. Click Here to learn more about the Zone Recognition tab
  - 6.3. Click Here to learn more about the Magic Indexing tab
  - 6.4. Click Here to learn more about the PDF Bookmark tab
  - 6.5. Click Here to learn more about the Database Validation tab
  - 6.6. Click Here to learn more about the Export tab
  - 6.7. Click Here to learn more about the Offsite Index tab
  - 6.8. Click Here to learn more about the Batch Progression tab
  - 6.9. Click Here to learn more about the Active Import tab
  - 6.10. Click Here to learn more about the Batch Name tab
  - 6.11. Click Here to learn more about the Filename tab
- 7. Click Ok
- 8. The new Batch Profile will appear in the Batch Profile Administration panel
- 9. Notice on the Batch Profile Administration panel, there is a column for 'Cost Per Page'

- 9.1. This is used for the Reporting Tool to incorporate revenue into the Profit & Loss Report
- 9.2. If you charge departments or clients for scanning services, input the amount you charge per page here
- 9.3. Amounts shown are in USD. 1.000 = 1 Dollar
- 9.4. To edit the value, click on the cell in the grid that you want to edit and a counter button will appear to adjust the amount up or down

# How to Edit an Existing Batch Profile

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Select the Batch Profile you wish to modify
- 4. Click Edit
- 5. Configure the Batch Profile settings
  - 5.1. Click Here to learn more about the Index Fields tab
  - 5.2. Click Here to learn more about the Zone Recognition tab
  - 5.3. Click Here to learn more about the PDF Bookmark tab
  - 5.4. Click Here to learn more about the Database Validation tab
  - 5.5. Click Here to learn more about the Export tab
  - 5.6. Click Here to learn more about the Offsite Index tab
  - 5.7. Click Here to learn more about the Batch Progression tab
  - 5.8. Click Here to learn more about the Active Import tab
  - 5.9. Click Here to learn more about the Batch Name tab
  - 5.10. Click Here to learn more about the Filename tab
- 6. Click Ok
- 7. The Batch Profile information will be saved
- 8. Notice on the Batch Profile Administration panel, there is a column for 'Cost Per Page'
  - 8.1. This is used for the Reporting Tool to incorporate revenue into the Profit & Loss

#### Report

- 8.2. If you charge departments or clients for scanning services, input the amount you charge per page here
- 8.3. Amounts shown are in USD. 1.000 = 1 cent
- 8.4. To edit the value, click on the cell in the grid that you want to edit and a counter button will appear to adjust the amount up or down

#### How to Delete a Batch Profile

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Select the Batch Profile you wish to delete
- 4. Click Delete
- 5. A confirmation message will appear, click Yes to delete
- 6. The Batch Profile will be removed from the system
- \*A Batch Profile may not be deleted while there are batches in the Batch Directory assigned to the Batch Profile.

# 4.10.1 Index Field Settings

The Index Fields tab within the Batch Profile allows administrators to Create / Modify / Delete Index Fields and assign specific properties to each Index Field individually within a Batch Profile.

#### How to Add / Edit Index Fields in a Batch Profile

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Create a New profile or Edit an existing profile. Click Here to learn how.
- 4. Go to the Index Fields tab
- 5. Each row in the grid represents 1 index field
- 6. In the 'Field Name' type the desired label for the Index Field
- 7. Set other Index Field options
  - 7.1. 'Required' = Forces a value to be entered into the Index Field. It cannot be left blank.

- 7.2. 'Sticky' = Carries the value entered into an Index Field from the previous onto the next document allowing the user to stick the value entered on every document, until changed. It works like a copy/paste function would.
- 7.3. 'Batch Index' = If 'Batch Index' is selected in the Batch Profile, Upon creating a batch in the batch directory, Dokmee Capture will prompt the user to enter an index field value. The index field Value will propagate across all Documents, it will be available on the Index Module as read Only and Available in the export module for Foldering/File Name if the data type allows Foldering and File Name. 'Batch Index' index value does not show up on the QC Index and can't be replaced.
- 7.4. 'Field Length' = Restricts the value entered into an Index Field to a maximum character length. This length includes spaces. Default amount is the standard Windows limit for a filename 255.
- 7.5. 'Default Value' = Sets a default value that will appear in the Index Field, rather than a blank value that is shown by default. This can be used with or without Select List fields.
- 7.6. 'Field Type' = Represents the data type of the Index Field.
  - 7.6.1. **Numeric and Text** = Allows any letter, number, or character from the keyboard to be entered into the Index Field.
  - 7.6.2. **Text Only** = Allows only letters and characters from the keyboard to be entered into the Index Field. No numbers.
  - 7.6.3. **Numeric Only** = Allows only numbers from the keyboard to be entered into the Index Field. No letters or characters.
  - 7.6.4. **Date** = Forces values to be entered in a specified date format. Several different formats are available when the 'Options' button is clicked.
  - 7.6.5. **Select List** = Allows custom drop down lists for users to select from when indexing. Click 'Options' to add or edit values in the Select List.
    - To add items to the Select List, type the list item into the first text box and click 'Add Value'. It will be added to the Select List box of values.
    - When 'Auto Sort' is checked on, it will sort the drop down list in alphabetical order when displayed in the Index Module.
    - When 'Forced Match' is checked on, it will force the users to choose a
      value from the drop down list in the Index Module. When 'Forced Match' is
      left unchecked, users will be able to either choose a value from the drop
      down list or enter their own value in the Index Module (when a value is
      added in the Index Module, it does not get added to the Select List of
      options).

- To delete an item from the Select List, choose the item in the Select List box of values and click 'Remove Value'.
- Once 'Ok' is clicked, a Select List is created and named by the Batch Profile and Index Field name combination.
- You may copy a select list from the same Batch Profile or from another
  Batch Profile by selecting the Profile and Field in the drop down lists and
  clicking on 'Copy'. This will replicate an already existing Select List in the
  system. Only Batch Profiles and Index Fields containing Select Lists will
  appear in the drop down lists. Once the copied Select List is created, you
  may edit it to be customized to the existing Batch Profile and Index Field.

#### How to Delete an Index Field in a Batch Profile

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Edit an existing profile. Click Here to learn how.
- 4. Go to the Index Fields tab
- 5. Click the 'Delete' button for the row containing the Index Field you would like to delete.
- \*Please note that there is no confirmation message when deleting an Index Field. Once an Index Field is deleted, it cannot be recovered. All batches containing metadata within that field will lose the metadata for the deleted Index Field.

#### How to Re-order Index Fields in a Batch Profile

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Edit an existing profile. Click Here to learn how.
- 4. Go to the Index Fields tab
- 5. Highlight the 'Field Name' cell of the Index Field you wish to move, and click the green 'Up' or 'Down' arrow to change the display order of the Index Fields.

#### Learn More About Other Related Batch Profile Options

- ➤ Click Here to learn more about the Zone Recognition tab
- Click Here to learn more about the PDF Bookmark tab

- > Click Here to learn more about the Database Validation tab
- > Click Here to learn more about the Export tab
- > Click Here to learn more about the Offsite Index tab
- > Click Here to learn more about the Batch Progression tab
- > Click Here to learn more about the Active Import tab
- > Click Here to learn more about the Batch Name tab
- > Click Here to learn more about the Filename tab

# 4.10.2 Zone Recognition Templates

The Zone Recognition tab within the Batch Profile allows you to create automatic indexing templates.

### **Supported Linear Barcodes**

- Code 39
- Code 93
- Code 128
- Codabar
- Code 25 Interleaved 2 of 5
- EAN-13
- UPC-A

### **Supported 2D Barcodes**

- PDF417
- Data Matrix
- QR Code

# **Supported Text Recognition**

- OCR (Optical Character Recognition)
- MICR (Magnetic Ink Character Recognition)
- DotMatrix

• ICR (Handwriting Recognition)

## **Supported Mark Recognition**

OMR (Optical Mark Recognition)

Click Here to learn how to automatically run Zone Recognition on batches through the Batch Processing module. Click Here to learn how to verify index data that was captured during the Batch Processing module.

Click Here to learn how to manually run and verify Zone Recognition on batches through the Index module.

#### How to Create a Barcode Zone Zecognition Template

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Create a New profile or Edit an existing profile. Click Here to learn how.
- 4. After creating the Index Fields, go to the Zone Recognition tab
  - 4.1. Click Here to learn how to create Index Fields
- 5. Click the 'Create Template' button
- 6. When the Zone Recognition Template screen appears, you must first scan or import a sample page
  - 6.1. Click the 'Scan' button to scan a sample page from an attached scanner
  - 6.2. Click the 'Import' button to import a sample page from the file system (PDF, TIF, JPG)
  - 6.3. Multiple pages may be scanned or imported for multi-page recognition templates
  - 6.4. Make sure that the image being scanned or imported is the same DPI that the batches will be scanned in
- 7. Once the template page is available, click the 'New Zone' button
- 8. A new zone will appear on the sample page
- 9. Select the zone with the mouse and move it over the barcode you wish to capture. Resize the zone using the edges and corners of the zone. This method should be used when the barcode is always in the same location on the page. If the location of the barcode varies, and only 1 barcode is being recognized, make the zone as large as

the entire page.

- 9.1. If the barcode is one that Dokmee Capture recognizes, the barcode type will automatically appear in the 'Barcode Type' drop down box and a preview of the value will appear in the bottom left corner of the screen. If the barcode is not automatically recognized, check to make sure that it is a compatible barcode type and that the zone is large enough to cover the entire barcode.
- 10. Select the index field that the zone should be tied to in the 'Index Field' drop down box
- 11. Select the compatible barcode in the 'Barcode Type' drop down box, in case it was not automatically selected
- 12. If the zone should be used as both indexing and separation, check the box under the 'Separation' column
  - 12.1. Separation zones can only be set on page 1 of the template
  - 12.2. In the 'Separation Information' section under the zone listing, set the separation options:
    - 12.2.1. The confidence level determines how sensitive the separation settings should be. The lower the confidence level, the more sensitive the separation will be creating more documents.
    - 12.2.2. If a specific barcode or text value should be used, such as "Separator" or "New Document", type the value to look for in the 'Separator value' text box. When using this option, all other text or barcodes not matching that value found within the one will not create a new document, but will be used for indexing.
    - 12.2.3. If more than one zone is checked for separation, use the 'And' option to validate the separation using both values.
    - 12.2.4. If more than one zone is checked for separation, use the 'Or' option to separate on either zone found.
- 13. If more than one barcode is being recognized for multiple index fields, repeat steps 7 12 for the next zone
  - 13.1. If a different zone recognition type is needed for another zone, see the other "how to..." options to see how to setup those zones. Zone types can be mixed on the same template.
- 14. Once all recognition zones have been created, click the 'Apply' and click 'OK'.
- How to Create a Fixed Location Text OCR Zone Recognition Template

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Create a New profile or Edit an existing profile. Click Here to learn how.
- 4. After creating the Index Fields, go to the Zone Recognition tab
  - 4.1. Click Here to learn how to create Index Fields
- 5. Click the 'Create Template' button
- 6. When the Zone Recognition Template screen appears, you must first scan or import a sample page
  - 6.1. Click the 'Scan' button to scan a sample page from an attached scanner
  - 6.2. Click the 'Import' button to import a sample page from the file system (PDF, TIF, JPG)
  - 6.3. Multiple pages may be scanned or imported for multi-page recognition templates
  - 6.4. Make sure that the image being scanned or imported is the same DPI that the batches will be scanned in
- 7. Once the template page is available, click the 'New Zone' button
- 8. A new zone will appear on the sample page
- 9. Select the zone with the mouse and move it over the text you wish to capture. Resize the zone using the edges and corners of the zone.
- 10. Select the index field that the zone should be tied to in the 'Index Field' drop down box
- 11. Select 'TextOCR' in the 'Barcode Type' drop down box
- 12. If the zone should be used as both indexing and separation, check the box under the 'Separation' column
  - 12.1. Separation zones can only be set on page 1 of the template
  - 12.2. In the 'Separation Information' section under the zone listing, set the separation options:
    - 12.2.1. The confidence level determines how sensitive the separation settings should be. The lower the confidence level, the more sensitive the separation will be creating more documents.
    - 12.2.2. If a specific barcode or text value should be used, such as "Separator" or

"New Document", type the value to look for in the 'Separator value' text box. When using this option, all other text or barcodes not matching that value found within the one will not create a new document, but will be used for indexing.

- 12.2.3. If more than one zone is checked for separation, use the 'And' option to validate the separation using both values.
- 12.2.4. If more than one zone is checked for separation, use the 'Or' option to separate on either zone found.
- 13. In the 'Options' section under the zone listing, set the Text OCR options:
  - 13.1. Select the OCR language from the drop down
  - 13.2. for DotMatrix text, select 'DotMatrix' in the 'Text Type' drop down
  - 13.3. To ignore spaces capture during the zone recognition process, check the box next to 'Remove TextOCR spaces'
  - 13.4. To increase accuracy of OCR and reduce speckle interference, check the box next to 'Enable OCR noise filter'
- 14. If more than one text OCR zone is being recognized for multiple index fields, repeat steps 7 13 for the next zone
  - 14.1. If a different zone recognition type is needed for another zone, see the other "how to..." options to see how to setup those zones. Zone types can be mixed on the same template.
- 15. Once all recognition zones have been created, click the 'Apply' and click 'OK'.
- How to Create a Variable Location or Multiple Value Text OCR Zone Recognition Template
   Smart Zone

Smart Zone is used when you have section labels that could possibly move to different areas of the page.

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Create a New profile or Edit an existing profile. Click Here to learn how.
- 4. After creating the Index Fields, go to the Zone Recognition tab
  - 4.1.Click Here to learn how to create Index Fields
- 5. Click the 'Create Template' button

- 6. When the Zone Recognition Template screen appears, you must first scan or import a sample page
  - 6.1. Click the 'Scan' button to scan a sample page from an attached scanner
  - 6.2. Click the 'Import' button to import a sample page from the file system (PDF, TIF, JPG)
  - 6.3. Multiple pages may be scanned or imported for multi-page recognition templates
  - 6.4. Make sure that the image being scanned or imported is the same DPI that the batches will be scanned in
- 7. Once the template page is available, click the 'New Zone' button
- 8. A new zone will appear on the sample page
- 9. Select the zone with the mouse and move it over the area of the page with the text you wish to capture. Resize the zone using the edges and corners of the zone. Smart Zones are usually larger areas than a typical zone and can encompass multiple lines of text.
- 10. Select the index field that the zone should be tied to in the 'Index Field' drop down box
- 11. Select 'Smart Zone' in the 'Zone Type' drop down box
- 12. Click on the pencil at the end of the zone listing row to set the Smart Zone options
  - 12.1. In the 'Target Label' section, add the labels that the recognition engine should look for. Type the label name in the text box and click the 'Add Label' button. You may add multiple labels if there are different label names on different documents.
    - 12.1.1. Examples: Name, Address, Vendor Name
  - 12.2. In the 'Value Location' section, set the location of the text to be recognized in relation to the target label.
    - 12.2.1. In the first drop down, choose the horizontal location selecting either "Right" or "Left" and then setting the number of spaces to move in that direction for the zone recognition engine to find the text to grab.
    - 12.2.2. In the second drop down, choose the vertical location selecting either "Up" or "Down" and then setting the number of lines to move in that direction for the zone recognition engine to find the text to grab.
    - 12.2.3.

- 13. If more than one Smart Zone is being recognized for multiple index fields, repeat steps 7 13 for the next zone
  - 13.1. If a different zone recognition type is needed for another zone, see the other "how to..." options to see how to setup those zones. Zone types can be mixed on the same template.
- 14. Once all recognition zones have been created, click the 'Apply' and click 'OK'...

### How to Create a Handwriting Zone Recognition Template

Please note that handwriting recognition is most accurate on upper case letters. Handwriting recognition will only work on normal print; it will not work on cursive, longhand, script, or joined-up writing.

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Create a New profile or Edit an existing profile. Click Here to learn how.
- 4. After creating the Index Fields, go to the Zone Recognition tab
  - 4.1. Click Here to learn how to create Index Fields
- 5. Click the 'Create Template' button
- 6. When the Zone Recognition Template screen appears, you must first scan or import a sample page
  - 6.1. Click the 'Scan' button to scan a sample page from an attached scanner
  - 6.2. Click the 'Import' button to import a sample page from the file system (PDF, TIF, JPG)
  - 6.3. Multiple pages may be scanned or imported for multi-page recognition templates
  - 6.4. Make sure that the image being scanned or imported is the same DPI that the batches will be scanned in
- 7. Once the template page is available, click the 'New Zone' button
- 8. A new zone will appear on the sample page
- 9. Select the zone with the mouse and move it over the text you wish to capture. Resize the zone using the edges and corners of the zone.
- 10. Select the index field that the zone should be tied to in the 'Index Field' drop down box

- 11. Select one of the ICR options in the 'Barcode Type' drop down box. If you are not sure which one to use, try each one and look at the zone value preview in the bottom left corner of the screen to see which works best.
  - 11.1. ICR = normal free flow writing on a single line
  - 11.2. ICR-Spaced = individual letters are written spaced apart but will be captured as one word
  - 11.3. ICR-Boxed = each letter is confined within an individual binding box
- 12. If more than one ICR zone is being recognized for multiple index fields, repeat steps 7 11 for the next zone
  - 12.1. If a different zone recognition type is needed for another zone, see the other "how to..." options to see how to setup those zones. Zone types can be mixed on the same template.
- 13. Once all recognition zones have been created, click the 'Apply' and click 'OK'..

#### How to Create an MICR Zone Recognition Template

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Create a New profile or Edit an existing profile. Click Here to learn how.
- 4. After creating the Index Fields, go to the Zone Recognition
  - 4.1.Click Here to learn how to create Index Fields
- 5. Click the 'Create Template' button
- 6. When the Zone Recognition Template screen appears, you must first scan or import a sample page
  - 6.1. Click the 'Scan' button to scan a sample page from an attached scanner
  - 6.2. Click the 'Import' button to import a sample page from the file system (PDF, TIF, JPG)
  - 6.3. Multiple pages may be scanned or imported for multi-page recognition templates
  - 6.4. Make sure that the image being scanned or imported is the same DPI that the batches will be scanned in
- 7. Once the template page is available, click the 'New Zone' button

- 8. A new zone will appear on the sample page
- 9. Select the zone with the mouse and move it over the text you wish to capture. Resize the zone using the edges and corners of the zone.
- 10. Select the index field that the zone should be tied to in the 'Index Field' drop down box
- 11. Select 'MICR' in the 'Barcode Type' drop down box
- 12. In the 'Options' section under the zone listing, select the proper font in the 'MICR Font' drop down. If you are not sure which one to use, try each one and look at the zone value preview in the bottom left corner of the screen to see which works best.
- 13. If more than one MICR zone is being recognized for multiple index fields, repeat steps 7 12 for the next zone
  - 13.1. If a different zone recognition type is needed for another zone, see the other "how to..." options to see how to setup those zones. Zone types can be mixed on the same template.
- 14. Once all recognition zones have been created, click the 'Apply' and click 'OK'.

### How to Create an OMR Zone Recognition Template

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Create a New profile or Edit an existing profile. Click Here to learn how.
- 4. Go to the Zone Recognition tab
- 5. Click the 'Create Template' button or Click 'Modify Template'
- 6. When the Zone Recognition Template screen appears, you must first scan or import a sample page with OMR information
- 7. Click the 'Scan' button to scan a sample page from an attached scanner or Click the 'Import' button to import a sample page from the file system (PDF, TIF, JPG). OMR forms MUST be empty
- 8. Multiple pages may be scanned or imported for multi-page recognition templates
- 9. Make sure that the image being scanned or imported is the same DPI that the batches will be scanned in
- 10.Once the template page is available, click the 'New Zone' button
- 11.A new zone will appear on the sample page

- 12. Select 'OMR' under the 'Zone Type' drop down box
- 13. Select the zone with the mouse and move it over the corresponding zone you wish to capture. Resize the zone using the edges and corners of the zone. Make the zone is tight and encircling only the corresponding zone to capture (Circles).
- 14. Click on the pencil icon to configure the OMR settings
- 15. Select the corresponding OMR Data Type that matches the values on the form: Text or numeric
- 16. Select the Zone Orientation: Column or Row. Enter the corresponding Column/Row values
- 17. Select predefined Label. This values must be in the OMR form
- 18. Select OMR Zone Type. Multiple: Used when columns or rows are present. Grid: used for columns and rows
- 19. Click "Review Marks" . You should see that the circles are enclosed by the zone recognition
- 20. If more than one OMR zone is being recognized for multiple index fields, repeat steps 10 19 for the next zone. Click OK when done
- 21. Once all recognition zones have been created, click the 'Save and Close' button.

#### Learn More About Other Related Batch Profile Options

- > Click Here to learn more about the Index Fields tab
- > Click Here to learn more about the PDF Bookmark tab
- > Click Here to learn more about the Database Validation tab
- > Click Here to learn more about the Export tab
- Click Here to learn more about the Offsite Index tab
- > Click Here to learn more about the Batch Progression tab
- > Click Here to learn more about the Active Import tab
- > Click Here to learn more about the Batch Name tab
- > Click Here to learn more about the Filename tab

# 4.10.3 PDF Bookmark Settings

The PDF Bookmark tab within the Batch Profile allows administrators to create automatic PDF bookmark templates. With this function, Dokmee Capture is able to automatically create bookmarks in PDF files using barcode values found within multi-page documents.

Click Here to learn how to manually create PDF bookmarks from the Index Module.

#### How to Setup Automatic PDF Bookmark Creation

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Create a New profile or Edit an existing profile. Click Here to learn how.
- 4. Go to the PDF Bookmark tab
- 5. Click the 'Create Template' button
- 6. Scan or Import a document that contains the barcode to use as a bookmark.
  - 6.1. Supported file types for import are: PDF, JPEG, TIFF
  - 6.2. Make sure that the image being used for the template is the same DPI as the images that are imported or scanned into the batch. If they are not the same DPI, the automatic PDF Bookmarking may not work accurately.
- 7. Select the Zone Type. Note: Data matrix is the only supported barcode type that allow to create PDF bookmarks. It will auto detect the barcode if found. If not found on the template page it will not allow the user to select DataMatrix from the drop down.
- 8. Click the 'Save and Close' button

Make sure that the Zone Recognition module is part of the Batch Progression, or automatic PDF Bookmarking will not run.

Bookmarks will only be created for PDF files. Make sure that you export files as PDF if you wish to use the automatic bookmark creation function within Dokmee Capture.

#### Learn More About Other Related Batch Profile Options

- > Click Here to learn more about the Index Fields tab
- Click Here to learn more about the Zone Recognition tab
- > Click Here to learn more about the Database Validation tab
- > Click Here to learn more about the Export tab

- > Click Here to learn more about the Offsite Index tab
- > Click Here to learn more about the Batch Progression tab
- > Click Here to learn more about the Active Import tab
- > Click Here to learn more about the Batch Name tab
- > Click Here to learn more about the Filename tab

# 4.10.4 Database Validation Settings

The Database Validation tab within the Batch Profile allows administrators to link to an external Data Source from which meta data can be pulled during the Index Module process and automatically input into Index Field values.

#### **Compatible Data Sources**

- Microsoft Access Database
- Microsoft SQL Database
- Microsoft Excel
- TXT File

#### How to Setup Database Validation

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Create a New profile or Edit an existing profile. Click Here to learn how.
- 4. Go to the Database Validation tab
- 5. Select the 'Use Database Validation' option
- 6. Choose the Data Source Type from the drop down
- 7. Input the data source settings or browse for the file being used
- 8. Select the table to be used from the drop down (only for SQL and Access)
- 9. In the 'Match Column' drop down, choose which column should be used as the match code (unique identifier)
- 10. In the 'Index field to validate' drop down, choose which field you will be typing the

match code into in the Index Module

- 10.1. When this value is entered and the user hits the tab keyboard button, the rest of the index values will be automatically pulled from the data source.
- 10.2. If the field you will be typing into is not one of the Index Fields, then check the 'Use extra field...' option.
  - 10.2.1. This will display a field to type into during the Index Module for match code purposes, but what you type there will not be added to the flat file upon export. This is useful when using a Match Key / ID # field.
- 11. Match the database / spreadsheet columns to the corresponding Index Fields that should be auto filled
  - 11.1. If you do not want to pull every value into the system, then do not map that column to an index field. Leave it blank.
- 12. Click 'Ok'

Once setup, the database validation will perform a lookup on each document as you enter values into the Match Code index field within the Index Module.

- Learn More About Other Related Batch Profile Options
  - > Click Here to learn more about the Index Fields tab.
  - > Click Here to learn more about the Zone Recognition tab
  - > Click Here to learn more about the PDF Bookmark tab
  - > Click Here to learn more about the Export tab
  - > Click Here to learn more about the Offsite Index tab
  - > Click Here to learn more about the Batch Progression tab
  - > Click Here to learn more about the Active Import tab
  - > Click Here to learn more about the Batch Name tab
  - > Click Here to learn more about the Filename tab

## 4.10.5 Export Settings Templates

The Export tab within the Batch Profile displays the name of the Export Template that is being used. Settings for the template must be adjusted from the Export Module.

Click Here to learn how to save an export settings template from the Export Module.

- Learn More About Other Related Batch Profile Options
  - > Click Here to learn more about the Index Fields tab
  - > Click Here to learn more about the Zone Recognition tab
  - > Click Here to learn more about the PDF Bookmark tab
  - > Click Here to learn more about the Database Validation tab
  - > Click Here to learn more about the Offsite Index tab
  - > Click Here to learn more about the Batch Progression tab
  - > Click Here to learn more about the Active Import tab
  - > Click Here to learn more about the Batch Name tab
  - > Click Here to learn more about the Filename tab

# 4.10.6 Offsite Index Settings

The Offsite Index tab within the Batch Profile allows you to set the storage location and retrieval location options for the Offsite Indexing process.

Click Here to learn more about how to use the Offsite Indexing feature.

How to Change the Storage Location of Files Ready to Index

The 'Copy for Indexing' path is where files will be sent when the "Copy for Offsite Indexing" option is selected upon validating a batch from the Quality Control module. Click Here to learn how to validate a batch in Quality Control and copy for offsite index.

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Create a New profile or Edit an existing profile. Click Here to learn how.
- 4. Go to the Offsite Index tab
- 5. In the 'Copy for Indexing' section, select the 'Alternate Path' option
- 6. Browse to the location where the copied files should be stored

\*Once the path is changed, all batches copied for offsite indexing will send the files to this new location. To change back to the default "Ready to Index" folder in the Central Path, edit the batch profile and select the 'Use default path..." option.

### How to Change the Look-up Location for Index Files to Import

The 'Import Indexing' path is where the system will look for index text files when the 'Import Indexes' option is used in the Index module. Click Here to learn how to import indexes from the Index module.

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Create a New profile or Edit an existing profile. Click Here to learn how.
- 4. Go to the Offsite Index tab
- 5. In the 'Import Indexing' section, select the 'Alternate Path' option
- 6. Browse to the location where the index flat files will be stored for the system to retrieve
- 7. If you wish to delete the index flat files after successful import into the system, check the box next to "Delete related file..."

\*Once the path is changed, all batches using the 'Import Indexes' will use this new location. To change back to the default "Ready to Import" folder in the Central Path, edit the batch profile and select the 'Use default path..." option.

### How to Add Cost for an offsite index job

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Create a New profile or Edit an existing profile. Click Here to learn how.
- 4. Go to the Offsite Index tab
- 5. Enter the Cost
- 6. Enter the number of characters
- 7. Click Apply and Click OK

### Learn More About Other Related Batch Profile Options

> Click Here to learn more about the Index Fields tab

- > Click Here to learn more about the Zone Recognition tab
- > Click Here to learn more about the PDF Bookmark tab
- > Click Here to learn more about the Database Validation tab
- > Click Here to learn more about the Export tab
- > Click Here to learn more about the Batch Progression tab
- > Click Here to learn more about the Active Import tab
- > Click Here to learn more about the Batch Name tab
- > Click Here to learn more about the Filename tab

# 4.10.7 Batch Progression Settings

The Batch Progression tab within the Batch Profile allows administrators to add, remove, and reorder modules that batches go through during the processing workflow.

- How to Add and Remove Modules to a Batch Profile Processing Workflow
  - 1. Go to Home Screen
  - 2. Select Batch Profile
  - 3. Create a New profile or Edit an existing profile. Click Here to learn how.
  - 4. Go to the Batch Progression tab
  - 5. In the 'Selected Modules' list, it is pre-filled with a standard workflow: Scan/Import, Quality Control, Zone Recognition (only used if needed), Index, QC Index, Export
    - 5.1. To remove modules from this list, select the module you wish to remove and click the arrow button that is pointing to the left to move the module out of the 'Selected Modules' list.
    - 5.2. To add modules to the list, select the module you wish to add in the 'Available Modules' list and click the arrow button that is pointing to the right to move the module into the 'Selected Modules' list.
      - 5.2.1. Modules that may be added more than once will always be listed in the 'Available Modules' list, even if they are already in the 'Selected Modules' list. You may have batches run through the same module more than once at different points in Batch Progression.
      - 5.2.2. Modules that may only be added once in Batch Progression will be removed

from the 'Available Modules' list after they are added to the 'Selected Modules' list.

## What are the Module Rules and Dependencies

Certain modules have rules and order dependencies as listed below:

- Scan/Active Import must always be listed first in Batch Progression and is a required module
- Export must always be listed last in Batch Progression and is a required module
- QC Index may only be added if the Index Module is added to Batch Progression and must be after the Index Module
- Index Verification must be added after the Index module
- Magic Indexing cannot be added before scan and zone recognition or after QC index or Export
- Scan/Active Import and Export modules may only be added to Batch Progression once
- Quality Control, Barcode Recognition, Index Module, QC Index may all be added multiple times to Batch Progression
  - o The same module that is added multiple times, cannot be next to each other in Batch Progression.

# + Batch progression rules

- Some batch progression rules are (to name a few)
  - SC/AI (Scan/Active Import) > QC (Quality Control) > MI (Magic Indexing) > IDX (Index Module) > QC IDX (QC Index) > XP (Export)
  - II. SC/AI (Scan/Active Import) > QC (Quality Control) > IDX (Index Module) > IDX2 (Index Verification) > QC IDX (QC Index) > XP (Export)
  - III. SC/AI (Scan/Active Import) > QC (Quality Control) > BC (Zone Recognition) > IDX (index Module) > QC IDX (QC Index) > XP (Export). (Configured by default)
  - IV. SC/AI (Scan/Active Import) > QC (Quality Control) > BC (Zone Recognition) > MI (Magic Indexing) > IDX (Index Module) > IDX2 (Index Verification) > QC IDX (QC Index) > XP (Export)
- General rules:

- I. SC/AI (Scan/Active Import): Goes at the beginning and cannot be removed
- II. XP (Export): Goes at the end and cannot be removed
- III. Use combination of modules between SC/AI (Scan/Active Import) and XP (Export) modules
  - a) Most combinations are allowed but here are the exceptions
    - i. MI (Magic Indexing) module can only be added after BC(Zone Recognition)

      Module
    - ii. QC IDX module can not be added after SC/AI (Scan/Active Import)
- Auto Processing only work with the following batch processing rules (Auto Processing must be turned on from the home screen). Click Here to learn more about Dokmee Capture Auto Processing
  - SC/AI (Scan/Active Import) > XP (Export)
  - II. SC/AI (Scan/Active Import) > MI (Magic Indexing) > XP (Export)
  - III. SC/AI (Scan/Active Import) > BC (Zone Recognition) > XP (Export)
  - IV. SC/AI (Scan/Active Import) > BC (Zone Recognition) > MI (Magic Indexing) > XP (Export)
  - \* Upon configuring the batch progression (for Auto Processing) a check box will be showed and it must be selected so the Auto Processing can automatically process the batches (Auto Processing must be turned on from the home screen)
- Learn More About Other Related Batch Profile Options
  - ➤ Click Here to learn more about the Index Fields tab
  - Click Here to learn more about the Zone Recognition tab
  - > Click Here to learn more about the PDF Bookmark tab
  - > Click Here to learn more about the Database Validation tab
  - > Click Here to learn more about the Export tab
  - > Click Here to learn more about the Offsite Index tab

- > Click Here to learn more about the Active Import tab
- > Click Here to learn more about the Batch Name tab
- > Click Here to learn more about the Filename tab

# 4.10.8 Active / Automatic Import

The Active Import tab within the Batch Profile allows administrators to setup automatic importing of files into the system for further processing. This is useful when using network scanners or MFP devices or when receiving electronic files from an external source.

The Active Import feature enables documents to be imported from a specified location (hot folder) into Dokmee Capture on a regular schedule using a background service, even when Dokmee Capture is not running. This function runs as a Windows Service on the same computer where Dokmee Capture is installed.

A batch profile may only contain one scheduled import job at a time. You may however run multiple active import jobs on different batch profiles. When Active Import is turned on for a specific Batch Profile, it will take the place of the Scan Module.

### How to set up Active/Automatic Import

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Create a New profile or Edit an existing profile. Click Here to learn how.
- 4. Go to the Active Import tab
- 5. Select the 'Use Active Import' option
- 6. In the 'Source' section, browse to the local or network folder location where your files are located. The active import service will monitor this folder and look for new files each time it runs.
- 7. In the 'Schedule' section, select how often the source folder should be checked for new files to import
- 8. In the 'Options' section, check the box next to the desired options:
  - 8.1. Include Subfolders
    - 8.1.1. When checked, items will also be imported from subfolders found within the root source folder
    - 8.1.2. When unchecked, subfolders will be ignored

- 8.2. Create batch per subfolder
  - 8.2.1. When checked, a new batch will be created for each subfolder
  - 8.2.2. When unchecked, one single batch will be created for the entire group of subfolders
- 8.3. Retain folder name on export
  - 8.3.1. When checked, you will be able to retain the original folder name of the source folder as the exported folder name by selecting "Batch Name" in the foldering option of the Export module.
- 8.4. Delete files from source folder after import
  - 8.4.1. When checked, all files will be deleted from the source folder upon successful import into a new batch. Folders will not be deleted.
  - 8.4.2. When unchecked, all files will be moved into a "Dokmee Capture Imported" subfolder within the root source folder upon successful import into a new batch. subfolder structures will be replicated and files will be moved, but original source subfolders will not be removed.
- 8.5. Import File Name to an Index field: Easily Index a document index field using the document name. File name extension will not be imported. Check "Import file name to:" and select the index field that will hold the file name.
- 8.6. Separation
  - 8.6.1. Set the proper separation settings for the documents. Click Here to learn more about the Separation Options.
- Learn More About Other Related Batch Profile Options
  - > Click Here to learn more about the Index Fields tab
  - Click Here to learn more about the Zone Recognition tab
  - Click Here to learn more about the PDF Bookmark tab
  - > Click Here to learn more about the Database Validation tab
  - > Click Here to learn more about the Export tab
  - Click Here to learn more about the Offsite Index tab
  - > Click Here to learn more about the Batch Progression tab
  - > Click Here to learn more about the Batch Name tab

> Click Here to learn more about the Filename tab

# 4.10.9 Batch Name Settings

The Batch Name tab within the Batch Profile allows administrators to set options for automatic batch name settings. Automatic batch names may be forced by the administrators to minimize errors during the batch creation process.

- How to setup automatic batch naming and numbering
  - 1. Go to Home Screen
  - 2. Select Batch Profile
  - 3. Create a New profile or Edit an existing profile. Click Here to learn how.
  - 4. Go to the Batch Name tab
  - 5. Check the box next to "Prefill the Batch Name..." and input a pre-fill value into the text box
    - 5.1. When this option is set, the pre-fill value will appear in the 'Bath Name' field when a user creates a new batch for the current Batch Profile
      - 5.1.1. To allow the user to change the pre-filled value, select the option under the 'User Control' section that says "User is allowed to change..."
      - 5.1.2. To force the user to use the pre-filled value without changing it, select the option under the 'User Control' section that says "Force prefilled value..."
  - 6. Check the box next to "Consecutively number the Batch Number..." and input a starting number into the text box and choose whether to use leading zeros or without leading zeros.
    - 6.1. When this option is set, the pre-fill number value will appear in the 'Bath Number' field when a user creates a new batch for the current Batch Profile. The number will consecutively increment as batches are created under the current Batch Profile.
      - 6.1.1. To allow the user to change the pre-filled number value, select the option under the 'User Control' section that says "User is allowed to change..."
      - 6.1.2. To force the user to use the pre-filled number value without changing it, select the option under the 'User Control' section that says "Force prefilled value..."
- Learn More About Other Related Batch Profile Options

- Click Here to learn more about the Index Fields tab.
- ➤ Click Here to learn more about the Zone Recognition tab
- > Click Here to learn more about the PDF Bookmark tab
- > Click Here to learn more about the Database Validation tab
- > Click Here to learn more about the Export tab
- > Click Here to learn more about the Offsite Index tab
- > Click Here to learn more about the Batch Progression tab
- > Click Here to learn more about the Active Import tab
- > Click Here to learn more about the Filename tab

# 4.10.10 Filename Settings

The Filename tab within the Batch Profile allows administrators to specify the filename that is used for images exported from Dokmee Capture. The default filename is Docu000#, with incremental document numbering starting back at 1 for each individual batch.

How to Change the Default Filename of Images Exported

Click Here to learn how to use an index field value as a file name upon export from the system.

Follow the steps below to learn how to change the default prefix and consecutive numbering filename upon export.

- 1. Go to Home Screen
- 2. Select Batch Profile
- 3. Create a New profile or Edit an existing profile. Click Here to learn how.
- 4. Go to the Filename tab
- 5. Type the desired filename text prefix value into the 'Prefix' text box
- 6. Choose a starting number
  - 6.1. This number will be used as the starting number for the first document of each batch being exported
- 7. Choose the number of total digits in the file number.

- 7.1. leading zeros will be used to match the total number of digits
- 8. Choose either '-' or '\_' as the separator to indicate if duplicates of the same filename are found in the export location folder
- Learn More About Other Related Batch Profile Options
  - > Click Here to learn more about the Index Fields tab
  - > Click Here to learn more about the Zone Recognition tab
  - > Click Here to learn more about the PDF Bookmark tab
  - > Click Here to learn more about the Database Validation tab
  - > Click Here to learn more about the Export tab
  - > Click Here to learn more about the Offsite Index tab
  - > Click Here to learn more about the Batch Progression tab
  - > Click Here to learn more about the Active Import tab
  - > Click Here to learn more about the Batch Name tab

# 4.10.11 Magic Indexing Settings

The Magic Indexing Template provides instructions about where and what index values are needed to be indexed. To learn more about Magic Indexing click here

How to Create a Magic Indexing Template?

From the Dokmee Capture home Screen

- 1. Click on Batch Profile button
- 2. Select a batch profile and click edit or Create a new batch profile. Click here to learn about how to create a batch profile
- 3. Click on the Magic Indexing tab
- 4. Click on Create template
- 5. Under Language, select English, francés or Español. This is the language used to index the documents and the language that the documents are written in.
- 6. Click Import to import the desired document template. You can Import same type of

document for the template (single page or multiple pages document) (see i.) OR Import different type of documents for the template (see ii.) by appending the pages (each page or page range represent a different type of document)

- i. Magic Indexing can Index the same type of documents in a batch (one or multiple pages in the MI template represent a single type of document in the batch)
  - E.g. 1. Rental agreement with several pages or a single page: Corresponding zones will need to be placed on the corresponding page(s)
  - E.g. 2. Invoice template can be from one vendor and the batch can have invoices from same or different vendors
- ii. Magic indexing can ALSO index different type of documents in the batch (each page or page range in the MI template represent a different type of document in the batch)
  - E.g. 1 First page could be an invoice, second page could be a check (Add more pages as needed). Each page or page range represent a different document type to be indexed. Corresponding zones will need to be drawn in each page representing the type of document

Note: Append pages to the existing imported Document by clicking the Import button.

When asked "Do you want to append Imported Images? click "Yes" to append

- 7. Click New Zone
- 8. Under index Field, select the corresponding index field name
- 9. A rectangular zone appears on the top left of the document. Move the rectangular zone to where the desired index field is needed to be collected. Resize the zone accordingly, large zones are acceptable, just make sure that the data to be collected is present in the zone and that it can not be confused by similar data.
- 10. Repeat steps 7 to 9 until you have drawn all the zones on the template document
- 11. Under the "Instructions" section, add your own instructions. It is important to mention the Zone Number when giving instructions if needed
  - E.g. 1. Zone 1: Collect first name only, do not index last name
  - E.g. 2. Template: Page 1: Invoice. Page 2-3: Bill
- 12. Click Apply
- 13. Click Preview to view zones and instructions on the document
  - Inspect the zones on document, Read carefully the instructions under "Mapped Zones

with index field". Restricted characters will not be indexed and the specified field length cannot be exceed If index data surpasses the field length the remaining character will not be registered.

# 4.11 Reporting Tool

Track productivity and profitability with automated reports that collect data such as scan feed count, image count, separator page count, QC page count, deleted page count, index character count, exported page count. Automatic calculations are performed based on employee costs and charge backs to clients when Dokmee Capture is being used in a service bureau environment.

How to Generate a Report

- 1. Go to Home Screen
- 2. Select Reporting Tool
- 3. Select a date range
- 4. Choose a Report Type that best matches the expected outcome

If selecting 'Profit /Revenue -Per Batch' or 'Profit /Revenue -Per Batch Profile' use Additional Costs to submit cost per user

- 5. Click Generate Report. The report will be displayed on the Main Report window. If the report is too large use the navigation functionality to navigate from one page to the other
- Once the Report was generated, the Filter option become availableIf desired, select the desired select list filter options and click Filter

<sup>\*</sup>The Cost per hour is added using the User Administrator module or use the 'Additional Costs' in the reporting tool.

<sup>\*</sup> When selecting 'Profit/Revenue - Per Batch', it calculates figures based on recorded time in Dokmee Capture. It does not use figures from the 'Manual Time Entry log'

<sup>\*</sup> When selecting 'Profit/Revenue - Per Batch Profile', it calculates figures based on time recorded in Dokmee Capture as well as time from 'Manual Time Entry log'

#### How to Export/Save a Report

- 1. Generate the desired report. See above to learn how to generate a report
- 2. After the report was generated, there are two options to export/save the generated report
- 2.1. If selecting the 'Save' button, the report can be exported in the following file formats: .rpt, .cvs, .xls, .xlslx, .doc, rtf and .xml
- 2.2. If selecting the 'Print' button, the report can be printed to a physical printer and depending of the printer functionality you can save the report in windows

<u>Click Here</u> to learn how to tie User Profiles into the Reporting Tool for helpful Performance and Profit & Loss reports.

<u>Click Here</u> to learn how to tie Batch Profiles into the Reporting Tool for helpful Profit & Loss reports.

# 4.12 Batch Directory

The Batch Directory lists all batches that are contained in the specified Central Path for Dokmee Capture.

Batches are listed by Batch ID, Batch Name, Profile, Date Created, Date Modified, Module, Status, User and Computer Name.

The date created column always indicates the creation date of the batch.

The module column indicates the module where the batch is currently being processed.

The status column indicates whether a batch is ready, in progress, suspended, needs rescans, or has an error.

The user column indicates the user that's currently accessing or last accessed the batch.

#### How to Create a New Batch

To create a batch in Dokmee Capture you must first create a batch profile.

- 1. Go to Home Screen
- 2. Select Batch Directory

- 3. Go to the New Batch section at the bottom left corner of the screen
- 4. Select a Batch Profile from the drop down
- 5. Type the name in the Batch Name field
- 6. Type a value in the Batch Number field: enter either letter, characters, or numbers
- 7. Batch Name listed in the Batch Directory will be: "BatchName BatchNumber"
- 8. Click New Batch

\*The new batch will be added to the grid that contains a list of all the batches.

### How to Open or Process a Batch

From the Batch Directory:

- 1. Select the batch you wish to process
- 2. Click Process: (blue) button at the bottom of the screen

OR

1. Double click on the batch you wish to process

OR

- 1. Right click on the batch you wish to process
- 2. Select Process from the context menu

### How to Unlock a Batch

Please note that batches stating 'In Progress' could mean that the batch is currently open on another machine. Only unlock batches that you know are 'In Progress' due to the software or computer crashing or if the network connection was lost during batch processing and the Batch is stuck in the 'In Progress' status.

From the Batch Directory:

- 1. Select the 'In Progress' batch you wish to unlock
- 2. Click Unlock: (yellow) button at the bottom of the screen
- 3. Click Yes on the confirmation pop-up

#### How to Delete a Batch

From the Batch Directory:

- 1. Select the batch you wish to delete
- 2. Click Delete: (red) button at the bottom of the screen
- 3. Click Yes on the confirmation pop-up

OR

- 1. Right click on the batch you wish to delete
- 2. Select Delete from the context menu
- 3. Click Yes on the confirmation pop-up

\*Please note that deleted batches may be recovered using the Restore Batches module, as long as the batches are still in the 'Deleted Batches' folder of the Central Path.

#### How to Rename a Batch

From the Batch Directory:

- 1. Right click on the batch you wish to rename
- 2. Select Rename from the context menu
- 3. Modify Batch Name and Batch Number at the bottom left corner of the screen
- 4. Click Update Batch

### How to change Module or change Status of a Batch

From the Batch Directory:

- 1. Select the batch you wish to change the Module and/or Status for
- 2. Go to the bottom right corner of the screen
- 3. Select an option from Module drop down list
- 4. Select an option from Status drop down list
- 5. You can change both Module and Status of a Batch at the same time or change them individually
- 6. Click Change

#### How to filter the Batch Directory list

From the Batch Directory:

- 1. Go to Batch Directory tab
- 2. Select All Batches
- 3. Choose the Module filter you wish to use
- \*Notice that the list of batches only shows batches for the selected filter

#### How to Search for a batch

From the Batch Directory:

- 1. On the search box, type the batch name
- 2. The list of batches that matches the search query will be displayed on the list

\*The batch ID, Batch Name, Profile, Date Created, Date Modified, Modules, Status, User, Computer Name are clickable and allow the end user to sort in ascending descending order

# 4.13 Batch Validation Settings & Easy Buttons

There are Easy Buttons within the batch workflow modules of Dokmee Capture to assist in quick validation and suspending of batches.

The 'Suspend' Easy Button will close the batch and return to Batch Directory leaving the batch in the current module with a status of "Suspended".

The 'Done' Easy Button has 2 modes: close and process in next module -OR- close and return to Batch Directory. See below how to change the Easy Button settings.

In the Quality Control module, there is a "Rescan" Easy Button that will close the batch and send it back to the Scan Module with a status of "Rescan file(s)".

In the Index module, there is a 'Next' Easy Button that validates indexing of the current document and moves to the next document, once all documents have been indexed, the Easy Button will change to 'Done'.

In the QC Index module, there is an 'Index' Easy Button that will close the batch and send it back to the Index module with a status of "Suspended".

#### How to change Easy Button settings

- 1. Go to Settings tab
- 2. Select Batch Validation
- 3. Turn Easy Button Auto Open On or Off

- 3.1. When turned On (green check mark), the 'Done' Easy Button will close the batch and automatically open / process the batch in the next module.
- 3.2. When turned Off, the 'Done' Easy Button will close the batch and return to Batch Directory.

# 4.14 Import Files Module

The Import Files module allows you to import images and electronic files into the system for the purpose of extracting data or to perform quality control.

The file types that are compatible for import are: TIFF, PDF, JPEG.

### How to Import files

- 1. Go to Home Screen
- 2. Select Import Files
- 3. To import individual files, click Select Files and select one or more files that you wish to import.
- 4. To import all files from the root of a folder, click Select Directory and select a folder you wish to import.
- 5. Click Open
- 6. The imported files will be added to the list in the left panel
- 7. Enter Batch Name
- 8. Enter Batch Number
- 9. Select a Batch Profile from the drop-down list
- 10. Select a Module from the drop-down list that the batch should start in
- 11. Select files or a directory from the left panel, click Add (green right arrow)
- 12. Repeat steps 7-12 to add remaining files in the left panel to a new batch -OR- click Add All (green right double-arrow) to add all the files to the new batch
- 13. (V6.3 and up)Import File Name to an Index field: Easily Index a document index field using the document name. File name extension will not be imported. Check "Import file name to:" and select the index field that will hold the file name.
- 14. Set the proper separation settings for the documents. Click Here to learn more about the Separation Options.
- 15. Click Import

16. Click OK on the completion pop-up

\*You will find the new batch(es) containing the files in the Batch Directory.

## 4.15 Scan Module

**Scanner Selection** 

**Scan Settings** 

**Separation Settings** 

**Barcode Indexing at Scan Time** 

**Document Tree** 

**Image Viewer** 

**Batch Closing Options** 

#### 4.15.1 Select Scanner

Click Here to learn how to select and configure a scanner.

## 4.15.2 Scan Settings

Click Here to learn how to configure scan settings.

### 4.15.3 Separation Settings

The Separation Settings controls the automatic document creation at scan time.

# **Separation Types**

- Patch Code
- Barcode: Code 39, Code 93, Code 128, Codabar, Interleaved 2 of 5, DataMatrix, EAN-13, PDF417, QR Code, UPC-A
- Specified consistent number of images per document
- Text OCR Zone

#### How to Setup Automatic Document Separation

From the Scan Module:

- 1. Go to Scan tab
- 2. Click Separation Settings

### Patch Code / Barcode separation:

- 1. Select the 'Separator' option
- 2. Choose the separator barcode type from the drop down
- 3. If the 'Value' field is left blank, a new document will be created for every barcode found of the type selected
- 4. To separate only on a specific barcode value, type that value into the 'Value' field. When this is filled in, a new document will only be created when the barcode value matches.
- 5. Check the 'Delete Separator Pages' box if the barcode being used is only for separation and is not needed as an image or if it is not needed for indexing or zone recognition. Checking this box will automatically delete all recognized separators after the new document is created.

#### Separation based on a specific number of pages:

- 1. Select the 'Separate Every \_\_ Page(s)' option
- Use the up and down arrows to set the number of pages per document. This will
  create a new document based on a number of images scanned in. For Duplex
  scanning, when a front and backside are detected, this would be counted as 2 pages/
  images.

#### Separate based on zone recognition template:

1. Select the 'Batch Profile Zone Separation' option

\*This option will only be enabled if the Batch Profile contains a Zone Recognition template. Click Here to learn how to setup a Zone Recognition template with separation.

## 4.15.4 Barcode Recognition - Scan

Barcode Indexing at Scan Time is used for reading barcodes and indexing at scan time rather than running through a barcode recognition process later. This feature is only useful when all of the following are true:

- All barcodes requiring recognition are on page 1 of each document.
- All barcodes are the same barcode type.
- Multiple barcodes are ordered on the page in the same order as the index fields for the Batch Profile and a barcode is never blank or skipped.

### How to Setup Barcode Indexing at Scan Time

From the Scan Module:

- 1. Go to Scan tab
- 2. Click Barcode Indexing
- 3. Check the 'Barcode Indexing at Scan Time' option
- 4. Choose the barcode type from the drop down
- \*Will only look for barcodes on page 1 of each document.
- \*If more than one barcode of the selected type is found, the values will be input into the index fields consecutively i.e. barcode 1 will go to index field 1 and barcode 2 will go into index field 2.

Flagging pages found with a specific barcode is useful to help identify and tag pages automatically as they are scanned.

### How to Automatically Flag Pages at Scan Time

From the Scan Module:

- 1. Go to Scan tab
- 2. Click Barcode Indexing
- 3. Check the 'Flag pages with \_\_ and value\_\_' option
- 4. Choose the barcode type from the drop down
- 5. If the 'Value' field is left blank, the page will be flagged for every barcode found of the type selected
- 6. To flag only on a specific barcode value, type that value into the 'Value' field. When this is filled in, a page will only be flagged when a barcode of the type selected matching the specified value is found.

<sup>\*</sup>Pages will remained flagged in all modules until manually un-flagged.

#### 4.15.5 Document Tree - Scan

The Document Tree is the listing of all documents and pages within the batch. Other functionality to import/replace/append/delete documents/pages becomes available when an user right click on the Document level or the page level.

Click Here to learn about the Shortcut keyboard options available when navigating and manipulating documents and pages.

#### How to Navigate Documents and Pages in the Document Tree

- Click the + and next to a document node in the tree to expend or collapse the
  document in order to show and hide the pages within that document. You can also
  expand and collapse document nodes using the 'Left' and 'Right' arrow keys on the
  keyboard.
- Use the 'Enter' key on the keyboard or the 'Up' and 'Down' arrow keys on the keyboard to navigate through the document tree.
- Notice that the page selected in the document tree is the one being displayed in the Image Viewer. If you select a document node in the tree, the first page of that document will be displayed in the image viewer.
- You can multi select pages and documents in the document tree using the 'Shift' key or the 'CTRL' key on the keyboard while also using the 'Up' and 'Down' arrow keys or while clicking with the left mouse button.

#### How to Mark and Flag Documents and Pages

You are able to flag documents and pages for easy identification in later modules.

- 1. Select a document or page within the document tree.
- 2. Right click with the mouse and select "Flag" -OR- use the ';' key on the keyboard. You can also flag a single document or page by click the check box next to the node in the document tree.
- 3. Add Comments and Notes to flagged documents and pages by right clicking and selecting "Comments". Type a note and click 'Ok'.

#### How to Import Documents using the document tree

Applies for the Scan Module.

1. Once at the Scan Module, click on the document node level

- 2. Click Import Files
- 3. if you Select "Use separation type form the Scan Module Menu", this option allow the end user to separate the documents base on 'Separation Settings' on the Scan Module
- 4. If you select "Separate as 1 document per file", this option will crate one document per file imported

\*If the batch is empty and want to import a document, you can right click on the white space of the document tree and select import.

### How to Navigate Flagged Pages Versus All Pages

By default, navigation within the document tree will allow you to click through all documents and pages.

To quickly navigate through only the documents and pages that have been flagged:

- 1. Go to Scan tab
- 2. Select All Files toggle button
- 3. Choose the Flagged Files option

\*While in this Flagged Files view mode, when using the 'Enter' key on the keyboard, navigation will be restricted to only the next and previous flagged documents and pages. This is a quick way to skip to see only flagged pages.

### How to Split and Combine Documents

#### **Split Documents**

If documents are not properly separated during scanning, you can split a single document into 2 documents using the Split function.

- 1. Select a page in the document tree where you want to split a document.
- 2. Right click with the mouse and select "Split" -OR- use the 'S' key on the keyboard.

\*The page that was selected in the document tree will become page 1 of the newly created split document.

#### **Combine Documents**

If documents are not properly combined during scanning, you can combine multiple documents into a single document using the Combine function.

- 1. Select 2 or more documents in the document tree using the 'Shift' or 'CTRL' keys on the keyboard.
- 3. Right click with the mouse and select "Combine" -OR- use the 'C' key on the keyboard.

\*The selected documents will be combined into 1 single document with the pages falling in the same sequential order that the documents were listed in the document tree.

#### How to Delete and Recover Deleted Documents and Pages

- 1. Select document(s) or page(s) in the document tree.
- 2. Right click with the mouse and select "Delete" -OR- use the 'Del' key on the keyboard.
- 3. Notice that the document(s) or page(s) are marked with a red X.
- 4. To un-mark the document(s) or page(s) for deletion, right click with the mouse and select "Un-Delete" -OR- use the '\' key on the keyboard.
- 5. To permanently delete document(s) or page(s), click the 'Refresh' button in the Scan tab. All documents and pages marked with a red X will be removed from the document tree and sent to the recycle bin.

### **Recycle Bin**

- 1. To recover deleted pages from the recycle bin, right click with the mouse on a page node in the document tree or use the 'u' key on the keyboard.
- 2. Select the page(s) to recover and click 'Ok'. Notice that the images are marked with the original document and page number location of where they were deleted from. The pages will be placed in the location that is currently selected in the document tree.

#### How to Rotate Images

- 1. Select a page within the document tree and use one of the following rotate options:
  - 1.1. Right click with the mouse and select "Rotate Right" or "Rotate Left".
  - 1.2. Use the rotate shortcut keys on the keyboard '[' for rotate left or ']' for rotate right.
- \*All rotations are always a single 90° clockwise per rotation function.
- \*Rotations can be performed on all pages within a document at one time by selecting

the document node in the tree before performing the rotation.

\*Rotations can be performed on multiple individual pages or documents at one time by multi selecting using the 'Shift' or 'CTRL' keys on the keyboard tree before performing the rotation.

## 4.15.6 Image Viewer - Scan

The Image Viewer is where a preview of pages will be during scanning and when clicking through the Document Tree.

Click Here to learn more about how to navigate through documents and pages in the Document Tree to display images in the viewer.

- How to Zoom on Images in the Viewer
  - 1. To zoom in, use the mouse cursor to perform a trace zoom. Click the left mouse button and drag around the area of the image you want to zoom in on, then release the button.
  - 2. To zoom out, double click with the left mouse button on the zoomed in image in the viewer. This returns the image to the previous zoom.
  - 3. You can also use the zoom options by clicking the right mouse button on the image and selecting "Best Fit", "Fit to width", or "Fit to height".
  - 4. To pan across a zoomed in image, right click on the image and select the 'Hand cursor'. This allows you to drag the image within the zoomed in view to preview different areas of the image.
- How to Adjust the Preview Rate of Images During Scanning
  - 1. Go to Scan tab
  - 2. Click on Page Preview Frequency
  - 3. Use the up and down arrows to change the page preview frequency during scan time

\*This will decrease or increase the preview rate of images as they are being scanned. While on 1, every page will be flashed in the preview area as it is scanned. If you increase the preview frequency, this could help the overall speed of the application and the scanning process. Increasing the page preview frequency means that you will not be able to see a preview of every single page as it is scanned.

- How to Crop a Scanned Image
  - 1. Right click on an image in the image viewer

- 2. Select the "Crop" tool
- 3. Draw a zone around the area of the image you wish to KEEP
- 4. Click 'Yes' on the confirmation message if the preview is acceptable
- \*Tip: Once you click 'Yes' on the confirmation message, the crop function cannot be undone.

#### How to Rotate Images

- 1. Select a page within the document tree and use one of the following rotate options:
  - 1.1. Right click with the mouse and select "Rotate Right" or "Rotate Left".
  - 1.2.Use the rotate shortcut keys on the keyboard '[' for rotate left or ']' for rotate right.
- \*All rotations are always a single 90° clockwise per rotation function.
- \*Rotations can be performed on all pages within a document at one time by selecting the document node in the tree before performing the rotation.
- \*Rotations can be performed on multiple individual pages or documents at one time by multi selecting using the 'Shift' or 'CTRL' keys on the keyboard tree before performing the rotation.

## 4.15.7 Batch Closing Options - Scan

While in the Scan Module, there are 2 options to close out of the module:

# **Done / Validate**

The 'Done' easy button will close the batch and send it to the next module in the Batch Progression for that Batch Profile.

Validating a batch by clicking the module window 'X' button in the top right corner and selecting 'Validate' will perform the same function as the 'Done' easy button. It will close the batch and send it to the next module in the Batch Progression for that Batch Profile.

## Suspend

Suspending a batch means it is not yet complete in the Scan module, but you need to close the batch at the moment. This will leave the batch in the Scan module with a status of "Suspended".

To Suspend a batch in the Scan Module, use the 'Suspend' easy button, or click the module window 'X' button in the top right corner and select 'Suspend'.

# 4.16 Magic Indexing Module

# **Getting Started**

## **Queue and Account Info**

# **Troubleshooting**

#### 4.16.1 Queue and Account Info

Account Info and Balance contain information about the Magic Indexing batch

+ What is Magic Indexing (MI) Queue and Account Info?

#### **Queue Tab**

Contains all the Magic Indexing batches that are been processed: Uploading, indexing and error batches

- 1. Columns contain Batch ID, Batch Name, Profile, Start Date, Computer Name, MI User Name, and Status
- 2. The status column contains hyperlinks, single click on the hyperlink will open the status window
- There are three types of hyperlinks:
- Uploading: When the batch is in uploading status, it can only be canceled from the computer that started the upload process
- Indexing: When the batch is in indexing status, it can no be canceled or move to another module in the batch progression. MI batch will remain lock
- Error: There are different types of errors. Error will result if the following conditions take place (The system may generate other errors, here are the most commons):

If Magic Indexing User is trying to run a MI batch in the batch progression, an error could result: (Click here for error troubleshooting)

 When there is no a Magic Indexing template and Magic Indexing batch had been added to the batch progression

- When the batch failed to be uploaded (E.g. network interruption)
- When the batch upload process was canceled by the end user
- When the uploaded batch become corrupted in the FTP server
- When a windows service client failed or it is stopped
- When an/some index field(s) in the indexed flat file does not match the index field type
- When the indexed flat file contain unsupported Dokmee Capture characters
- When an indexed field type is formatted incorrectly

#### Notes:

- \*Batches in error status will contain error information for troubleshooting purposes, click here to learn more about the Magic Indexing troubleshooting options
- \* The **Error** that is no shown in MI Queue is when the user is processing a batch and the MI user had no signed in. This batch error is shown in the batch directory as a hyperlink with a tool tip that will display the error detail
- 3. A Magic Indexing service is shown at the bottom left corner. It is a windows service client, it needs to be in running mode in order for Magic Indexing to process the MI batch(es). If the service is stopped, click on the stopped hyperlink and

#### **Account Info Tab**

Contains information about the current balance, available characters. The end User can Add credit, Auto Recharge and see completed batch History

- 1. Balance Info:
  - Displays the Available Characters
  - Displays Characters per Batch (Last 3 month)
  - Displays Characters Per Document (Last 3 moths)
  - The Add Credit option allows you to purchase characters.
- 2. Auto Recharge:
  - Allow user to auto recharge their account if the balance fall below certain level
  - Auto recharge settings range from 2000 characters to 200000 characters
- 3. History:

- Search functionality is available: search by Today, This Week, This Month, This Year or
   Custom
- Display the completed Magic Indexing Batches Along with the number of characters they purchase
- Use the drop down to search for batches from certain date
- Use the Search box functionality to search batches by Batch ID, Batch Name and Profile name

## 4.16.2 Troubleshooting

The following topic contains troubleshooting information about the Magic Indexing batch errors.



Magic Indexing batch error and resolution

- 1. Below are the most common Magic Indexing errors and resolutions
  - The batch will go into error when there is no a Magic Indexing template and Magic
     Indexing batch had been added to the batch progression
    - Resolution: Create a Magic Indexing template: Click here to learn how
  - The batch will go into error when the batch failed to be uploaded (E.g. network interruption)
    - Resolution: From batch directory, change the batch from Error status to Ready Status.

      Make sure DCMagicIndex service is running and that there is internet connection.
  - The batch will go into error when the batch upload process was canceled by the end user
    - Resolution: From batch directory, change the batch from Error status to Ready Status.
       Make sure DCMagicIndex service is running and that there is internet connection.
  - The batch will go into error when the uploaded batch become corrupted in the FTP server

- Resolution: From batch directory, change the batch from Error status to Ready Status.
   Make sure DCMagicIndex service is running and that there is internet connection.
- The batch will go into error when a windows service client failed or it is stopped
  - Resolution: turn on windows service (DCMagicIndex service) and from batch directory, change the batch from Error status to Ready Status

## + How to turn on Magic Indexing Windows Service?

Magic Indexing Service Client is essential to upload the MI batch and import the MI flat file/ Index values

- 1. From windows search box type: services
- 2. Click on the Gears Icon to open windows services
- 3. Locate DCMagicIndex service
- 4. Right click on DCMagicIndex Service and click Start
- \* If DCMagicIndex service does not start, it is likely that it need to run under a windows administrator account.

To add a DCMagicIndex service to run under admin account follow these steps:

- 1. Right click on DCMagicIndex service and click properties
- 2. Click on the Log On tab
- 3. Select "This Account" radio button
- 4. Type a windows administrator account
- 5. Click Apply and then OK
- 6. Try to start the DCMagic Index Service Again
- \* keep in mind that when the administrator password is changed, the DCMagic Index service will fail to start

# 4.17 Quality Control Module

The Quality Control Module is where you may perform a verification that documents are clean, rotated, properly separated or combined, and ready for indexing.

**Scanner Selection** 

**Scan Settings** 

**Image Cleanup Options** 

Replace / Insert / Append Pages

**Document Tree** 

**Image Viewer** 

**Batch Closing Options** 

## 4.17.1 Image Cleanup Options

The image cleanup options within the Quality Control module are done as a post-scan process. This means that the changes take effect on already scanned images, versus scanner driver cleanup options that occur as the paper is being scanned. Using post-scan cleanup options allows you to preview the adjustments on each image before making the final changes.

Cleanup Options will only work on black and white images. They will not work for color and grayscale images.

How to use Image Cleanup Options

From the Scan or Quality Control Module:

- 1. Select a document, page, or group of pages in the document tree
- 2. Right click with the mouse and select "Cleanup Options"
- 3. Use the check boxes next to each option to perform the cleanup
- 4. A preview of the cleanup option performed will appear in the viewer
- 5. Click "Save" to apply the changes to the selected pages

#### **Binarize**

Converts the image to binary. Binarize often results in better bi-tonal documents than those obtained when scanning directly to black and white.

**Blob Removal** 

Removes arbitrary blobs from the image.

#### **Border Removal**

Removes extra dark spaces around the edge of the document to maintain the quality of the image.

#### Deskew

Detects skew in a bi-tonal document and corrects the image by straighten it.

### **Speck Removal**

Removes specks from the image. Useful for removing noise from an image introduced by a scanner.

#### **Hole Punch Removal**

Removes round hole punches from the image from any of the 4 sides that appear when these documents are scanned.

#### **Invert Image**

Inverts an image when the background is black and the foreground is white.

#### **Line Removal**

Removes horizontal or vertical lines from the image and reconnects broken characters. Useful for pre-processing a form prior to OCR.

### **Margin Crop**

Removes margins (white space) from each side of an image. Decreases the image size, and confines the features on an image for processing.

### 4.17.2 Replace / Insert / Append Pages

# **Replace Pages**

Used to replace a poorly scanned page with a new one from a scanner or used to replace a place holder sheet with an imported image.

## **Insert Pages**

The Insert function will place the new pages into the document BEFORE the currently selected page.

## **Append Pages**

The Append function will place the new pages into the document AFTER the currently selected page.

How to Replace a Page With a New Scanned or Imported Image

### To replace a page with a new scanned image:

- 1. Select the page you wish to replace in the document tree
- 2. Right click with the mouse and select "Replace" -OR- click the "Replace" button above the document tree and select "Scanner"
- 3. An acquire image screen will appear and prompt you to scan the new page
- 4. You are only allowed to scan one page at a time using the Replace function
- 5. Preview the scanned image and click "Save" once you are ready to replace the page

### To replace a page with an imported image:

- 1. Select the page you wish to replace in the document tree
- 2. Right click with the mouse and select "Replace from File System" -OR- click the "Replace" button above the document tree and select "File System"
- 3. Browse for the file in the Windows dialogue that appears and click "Open"
- 4. You are only allowed to import one image at a time using the Replace function
- \*You may only import TIFF, PDF, JPEG images.
- How to Insert Scanned or Imported Images Into a Document

#### To insert page(s) from a scanner:

- 1. Select the page you wish to insert pages before in the document tree
- 2. Right click with the mouse and select "Insert" -OR- click the "Insert" button above the document tree and select "Scanner"
- 3. An acquire image screen will appear and prompt you to scan the new page(s)
- 4. You are allowed to scan multiple pages at a time using the Insert function
- 5. Preview the scanned image(s) and click "Save" once you are ready to insert the page(s)

### To insert page(s) by importing image(s):

- 1. Select the page you wish to insert pages before in the document tree
- 2. Right click with the mouse and select "Insert from File System" -OR- click the "Insert" button above the document tree and select "File System"
- 3. Browse for the file(s) in the Windows dialogue that appears and click "Open"
- 4. You are allowed to insert multiple images at a time using the Insert function
- \*You may only import TIFF, PDF, JPEG images.

How to Append Scanned or Imported Images to a Document

### To append page(s) from a scanner:

- 1. Select the page you wish to append pages after in the document tree
- 2. Right click with the mouse and select "Append" -OR- click the "Append" button above the document tree and select "Scanner"
- 3. An acquire image screen will appear and prompt you to scan the new page(s)
- 4. You are allowed to scan multiple pages at a time using the Append function
- 5. Preview the scanned image(s) and click "Save" once you are ready to append the page(s)

#### To append page(s) by importing image(s):

- 1. Select the page you wish to append pages after in the document tree
- 2. Right click with the mouse and select "Append from File System" -OR- click the "Append" button above the document tree and select "File System"
- 3. Browse for the file(s) in the Windows dialogue that appears and click "Open"
- 4. You are allowed to insert multiple images at a time using the Append function

#### 4.17.3 Document Tree - QC

The Document Tree is the listing of all documents and pages within the batch.

Click Here to learn about the Shortcut keyboard options available when navigating and manipulating documents and pages.

How to Navigate Documents and Pages in the Document tree

<sup>\*</sup>You may only import TIFF, PDF, JPEG images.

- Click the + and next to a document node in the tree to expend or collapse the
  document in order to show and hide the pages within that document. You can also
  expand and collapse document nodes using the 'Left' and 'Right' arrow keys on the
  keyboard.
- Use the 'Enter' key on the keyboard or the 'Up' and 'Down' arrow keys on the keyboard to navigate through the document tree.
- Notice that the page selected in the document tree is the one being displayed in the Image Viewer. If you select a document node in the tree, the first page of that document will be displayed in the image viewer.
- You can multi select pages and documents in the document tree using the 'Shift' key or the 'CTRL' key on the keyboard while also using the 'Up' and 'Down' arrow keys or while clicking with the left mouse button.

### How to Mark and Flag Documents and Pages

You are able to flag documents and pages for easy identification in later modules.

- 1. Select a document or page within the document tree.
- 2. Right click with the mouse and select "Flag" -OR- use the ';' key on the keyboard. You can also flag a single document or page by click the check box next to the node in the document tree.
- 3. Add Comments and Notes to flagged documents and pages by right clicking and selecting "Comments". Type a note and click 'Ok'.

#### How to Navigate Flagged Pages Versus All Pages

By default, navigation within the document tree will allow you to click through all documents and pages.

To quickly navigate through only the documents and pages that have been flagged:

- 1. Go to Scan tab
- 2. Select All Files toggle button
- 3. Choose the Flagged Files option

\*While in this Flagged Files view mode, when using the 'Enter' key on the keyboard, navigation will be restricted to only the next and previous flagged documents and pages. This is a quick way to skip to see only flagged pages.

#### How to Split and Combine Documents

#### **Split Documents**

If documents are not properly separated during scanning, you can split a single document into 2 documents using the Split function.

- 1. Select a page in the document tree where you want to split a document.
- 2. Right click with the mouse and select "Split" -OR- use the 'S' key on the keyboard.

\*The page that was selected in the document tree will become page 1 of the newly created split document.

#### **Combine Documents**

If documents are not properly combined during scanning, you can combine multiple documents into a single document using the Combine function.

- 1. Select 2 or more documents in the document tree using the 'Shift' or 'CTRL' keys on the keyboard.
- 3. Right click with the mouse and select "Combine" -OR- use the 'C' key on the keyboard.

\*The selected documents will be combined into 1 single document with the pages falling in the same sequential order that the documents were listed in the document tree.

#### How to Delete and Recover Deleted Documents and Pages

- 1. Select document(s) or page(s) in the document tree.
- 2. Right click with the mouse and select "Delete" -OR- use the 'Del' key on the keyboard.
- 3. Notice that the document(s) or page(s) are marked with a red X.
- 4. To un-mark the document(s) or page(s) for deletion, right click with the mouse and select "Un-Delete" -OR- use the '\' key on the keyboard.
- 5. To permanently delete document(s) or page(s), click the 'Refresh' button in the Scan tab. All documents and pages marked with a red X will be removed from the document tree and sent to the recycle bin.

### **Recycle Bin**

- 1. To recover deleted pages from the recycle bin, right click with the mouse on a page node in the document tree or use the 'u' key on the keyboard.
- 2. Select the page(s) to recover and click 'Ok'. Notice that the images are marked with

the original document and page number location of where they were deleted from. The pages will be placed in the location that is currently selected in the document tree.

#### How to Rotate Images

- 1. Select a page within the document tree and use one of the following rotate options:
  - 1.1. Right click with the mouse and select "Rotate Right" or "Rotate Left".
  - 1.2. Use the rotate shortcut keys on the keyboard '[' for rotate left or ']' for rotate right.
- \*All rotations are always a single 90° clockwise per rotation function.
- \*Rotations can be performed on all pages within a document at one time by selecting the document node in the tree before performing the rotation.
- \*Rotations can be performed on multiple individual pages or documents at one time by multi selecting using the 'Shift' or 'CTRL' keys on the keyboard tree before performing the rotation.

## 4.17.4 Image Viewer - QC

The Image Viewer is where a preview of pages will be when clicking through the Document Tree.

Click Here to learn more about how to navigate through documents and pages in the Document Tree to display images in the viewer.

#### How to Zoom on Images in the Viewer

- 1. To zoom in, use the mouse cursor to perform a trace zoom. Click the left mouse button and drag around the area of the image you want to zoom in on, then release the button.
- 2. To zoom out, double click with the left mouse button on the zoomed in image in the viewer. This returns the image to the previous zoom.
- 3. You can also use the zoom options by clicking the right mouse button on the image and selecting "Best Fit", "Fit to width", or "Fit to height".
- 4. To pan across a zoomed in image, right click on the image and select the 'Hand cursor'. This allows you to drag the image within the zoomed in view to preview different areas of the image.

#### How to Crop an Image

1. Right click on an image in the image viewer

- 2. Select the "Crop" tool
- 3. Draw a zone around the area of the image you wish to KEEP
- 4. Click 'Yes' on the confirmation message if the preview is acceptable
- \*Tip: Once you click 'Yes' on the confirmation message, the crop function cannot be undone.

#### How to Rotate Images

- 1. Select a page within the document tree and use one of the following rotate options:
  - 1.1. Right click with the mouse and select "Rotate Right" or "Rotate Left".
  - 1.2.Use the rotate shortcut keys on the keyboard '[' for rotate left or ']' for rotate right.
- \*All rotations are always a single 90° clockwise per rotation function.
- \*Rotations can be performed on all pages within a document at one time by selecting the document node in the tree before performing the rotation.
- \*Rotations can be performed on multiple individual pages or documents at one time by multi selecting using the 'Shift' or 'CTRL' keys on the keyboard tree before performing the rotation.

### 4.17.5 Batch Closing Options - QC

While in the Quality Control Module, there are several options to close out of the module:

#### Rescan

Marking the batch for Rescan allows you to leave the batch in the Quality Control module or send it back to the Scan module with the status of "Rescan file(s)".

To mark a batch for Rescan and send it back to the Scan module, use the 'Rescan' easy button, or click the module window 'X' button in the top right corner and select 'Send to Rescan stage'. Using the module close option allows you to choose either the Scan or Quality Control module with a status of "Rescan file(s)".

## Suspend

Suspending a batch means it is not yet complete in the Quality Control Module, but you need to close the batch at the moment. This will leave the batch in the Quality Control module with a status of "Suspended".

To Suspend a batch in the Quality Control module, use the 'Suspend' easy button, or click the module window 'X' button in the top right corner and select 'Suspend'.

## **Done / Validate**

The 'Done' easy button will close the batch and send it to the next module in the Batch Progression for that Batch Profile.

Validating a batch by clicking the module window 'X' button in the top right corner and selecting 'Validate' will perform the same function as the 'Done' easy button. It will close the batch and send it to the next module in the Batch Progression for that Batch Profile.

## **Copy for Offsite Indexing & Validate**

Click Here to learn more about sending batches for Offsite Indexing.

# 4.18 Batch Processing Module

## **Automatic Zone Recognition Processing**

# **Automatic Exporting**

## 4.18.1 Auto Zone Recognition

Auto Zone Recognition runs in the background for zone recognition template processing and automatic full text OCR .

- How to Run the Auto Zone Recognition
  - 1. From the Home Screen
  - 2. Select Batch Processing
  - 3. Under 'Batch Auto Zone Recognition Settings', check mark the 'Zone Recognition' box
  - 4. The batches that are ready to be processed in the Zone Recognition will be listed under the Batches Queue
  - 5. Click the 'Start' button to process the batch(es) in the Zone Recognition Module
  - 6. Once the batch(es) was/(were) processed, the list of Batch(es) Processed will be listed under the Batches Processed
  - 7. To view log of processed batches click the 'View Log'. Use Search functionality to locate the desired batch(es). The log can also be exported as .csv format

- \* The Batch Processing module must be opened in order to auto process the batch
- \* Batch Profile must contain a Recognition Template for automatic Processing
- \* Will only process batches that are ready to be processed by Zone Recognition and with 'Ready Status'

## 4.18.2 Auto Export

Auto Export runs in the background for automatic export.

- How to Run the Auto Export
  - 1. From the Home Screen
  - 2. Select Batch Processing
  - 3. Under 'Batch Auto Zone Recognition Settings', check mark the 'Export' box
  - 4. The batches that are ready to be processed by the export module will be listed under the Batches Queue
  - 5. Click the 'Start' button to process the batch(es) in the Export Module
  - 6. Once the batch(es) was/(were) processed, the list of Batch(es) Processed will be listed under the Batches Processed
  - 7. To view log of processed batches click the 'View Log'. Use Search functionality to locate the desired batch(es). The log can also be exported as .csv format
  - \* The Batch Processing module must be opened in order to auto process the batch
  - \* Batch Profile must contain a Export Template for automatic Processing
  - \* Will only process batches that are ready to be processed by the Export module and with 'Ready Status'

# 4.19 Auto Processing

**How to Run Auto Processing** 

## 4.19.1 How to run Auto Processing

Auto Processing functionality in Dokmee Capture allows to run batches automatically

## + Three basic rules to run Auto Processing

- 1. Batch Progression must contain modules that can be auto processed. The following modules can be added to Auto Processing: SC/AI (Scan/Active Import), BC (Zone Recognition), MI (Magic Indexing), XP (Export). Click Here to learn how how to setup a batch progression.
  - Active Import (SC/AI): DCImportService in windows services must be turned On and Batch profile must use an Active Import configuration.
  - Zone Recognition (BC): Zone Recognition template must be available
  - Magic Indexing (MI): Magic Indexing template must be available
  - Export (EX): Export template must be pre-configured
- Auto Processing check box must be checked in the Batch Progression module. Open a
  batch profile, configure a batch progression containing only modules for Auto
  Processing and click on the Batch Progression; Ultimately make sure that the Auto
  Processing check box is checked
  - Auto Processing check box is only visible if the batch progression contain only modules that can run automatically
- 3. Auto Processing must be turned on. Dokmee Capture Home > Auto Processing > Select "Toggle Button". Red: Auto Processing Is off. Green Auto Processing is On.
  - If auto processing is On and Dokmee Capture is closed, the Auto Processing will run on the background.
    - To open Dokmee Capture when running on background, Open the windows
       System Tray and click on the Dokmee capture Icon
    - To Close Dokmee Capture when running on background, Open the windows System Tray, right click on the Dokmee capture Icon and Select "Exit App"
  - If auto processing is On and windows user switch windows user, the Auto
     Processing will continue running on the background
  - If auto processing is On and windows session times out, the Auto Processing will continue run on the background
  - If auto processing is On and Dokmee Capture user sign out, the Auto Processing will be turn off

Auto processing can not run on Windows Sleep and Hybernate mode

## + How to Configure Auto Processing

- 1. Create a batch profile with any of the following Batch Progressions (Other are available):
  - SC/AI (Scan/Active Import) > BC (Zone Recognition) > XP(Export)
  - SC/AI (Scan/Active Import) > MI (Magic Indexing) > XP(Export)
  - SC/AI (Scan/Active Import) > BC > MI(Magic Indexing) > XP(Export)
  - SC/AI (Scan/Active Import)>XP(Export)

•

- 2. Check "Auto Processing" check box in the batch processing module.
- 3. Turn on "Auto Processing" from Dokmee Capture Home Screen.
- 4. From the Batch Directory, Create a batch using the batch profile created in step 1.
- 5. Batch will be processed automatically from start to finish.

**Note:** Auto Processing is designed to run separately from Batch Processing.

# 4.20 Blank Page Removal

The blank page removal tool is used to remove unwanted blank pages in batches that have already been scanned.

#### How to Run Blank Page Removal

- 1. Go to Home Screen
- 2. Select Blank Page Removal
- 3. Select the Batch(es) you want to process from the left box
- 4. Click Add to move the Batch(es) to the right box
- 5. If you want to ignore blank lead sheets, make sure the 'Remove blank lead pages' option is unchecked
- 6. In the Threshold box, type the amount of bytes per page that they system should look for to determine if the page is blank or contains information
- 7. Click 'Remove Blank Pages'

<sup>\*</sup>Tip: If you are not sure what amount to set for threshold, Open the batch in the Scan

or Quality Control module, and look at the average page size of the blank pages on the bottom status bar of the scan module while the page is in the image viewer.

### 4.21 Index Module

The Index Module is where you may perform manual data entry for scanned files or where you may verify the results of automated zone recognition and offsite indexing.

**Run Zone Recognition** 

**Import Indexes** 

**Indexing Documents** 

**Batch Closing Options** 

## 4.21.1 Run Zone Recognition

Click Here to learn how to verify zone recognition run from Batch Directory or Batch Processing.

How to Run Zone Recognition From the Index Module

Click Here to learn how to setup Zone Recognition templates.

- 1. in the Index Module.
- 2. Click 'Zone Recognition' in the Index tab of the main menu bar.
- 3. The index information that was automatically captured will be filled into the index fields on the right side panel.
- 4. Verify the index information and make any necessary changes and click the 'Next' button. As the cursor moves from the Zone Recognition index fields, the captured zone will be displayed on the document.
- 5. You do not have to click through every single document unless you wish to. Once a document has been indexed via the zone recognition, it will have a green check mark next to it in the 'Index Progress' tab on the left side of the document tree. (last tab with the green icon)
  - 5.1. After all documents have a green check mark by them, the 'Done' button will appear and you may close and validate the batch.

### 4.21.2 Import Indexes

How to Import Index Information from Flat Files in the Index Module

Click Here to learn how to import index information from a flat file that was sent for offsite index.

## 4.21.3 Indexing Documents

- How to Manually Index Documents
  - 1. To begin manual data entry, process a batch in the Index Module and use the index fields on the right panel.
  - 2. The first page of the document is displayed in the viewer and the document will be highlighted in the document tree.
  - 3. Type the index information into each index field and then use the [Tab] key on the keyboard or the mouse to go to the next index field. If you are on the last index field for that document, using the [Tab] key on the keyboard will take you to the next document or you can click the 'Next' button.
    - 3.1. Notice above the index fields that you have the option to use the [Enter] key on the keyboard to act as [Tab] and go to the next field, or you can set it to index the current document and then display the next document.
  - 4. During the manual indexing process, you are able to grab text off the image to use as index information using the 'Quick OCR' button.
    - 4.1. Click the 'Quick OCR' button and then draw a zone around the text you wish to capture.
    - 4.2. Verify the accuracy and then click with the mouse in the text box of the index field you wish to input the data to.
  - 5. You may zoom into an area of the page by drawing a box with the mouse. To lock the zoom to stay across multiple documents, first draw the zoom zone, then select the small drop down option on the mouse cursor icon of the image toolbar and select 'Lock'.

- 6. You can use the 'Sticky' option to act as an automatic copy and paste of the value entered for each index field individually as you click to the next document. To turn this on, check the box next to each index field.
- 7. Once a document has been indexed it will have a green check mark next to it in the 'Index Progress' tab on the left side of the document tree. (last tab with the green icon)
  - 7.1. After all documents have a green check mark by them, the 'Done' button will appear and you may close and validate the batch.

### How to Index Documents Using Database Validation

Click Here to learn how to setup Database Validation Settings.

- 1. To begin database validation, process a batch in the Index Module and use the index fields on the right panel.
- 2. The database validation will perform a lookup on each document as you enter values into the match code Index Field and then [Tab] or click onto the next index field.
- 3. Type the index information into the match code index field that was set in the Batch Profile Database Validation Settings, and then use the [Tab] key on the keyboard or the mouse to go to the next index field.
- 4. Values will be automatically pulled from the data source file and input into the mapped index fields based on the Batch Profile Database Validation Settings.
- 5. If duplicate values for the match code are found, a grid listing the options fro you to choose from will appear.

#### How to Verify Zone Recognition From Batch Directory or Batch Processing

Click Here to learn how to setup Zone Recognition templates.

Click Here to learn how to run Zone Recognition in the Index Module.

- 1. After running zone recognition from Batch Directory or from the Batch Processing module, process the batch in the Index module.
- 2. The first page of the document is displayed in the viewer and the document will be highlighted in the document tree.
- 3. The index information that was automatically captured will be filled into the index fields on the right side panel.
- 4. Verify the index information and make any necessary changes and click the 'Next' button.

- 5. You do not have to click through every single document unless you wish to. Once a document has been indexed via the zone recognition, it will have a green check mark next to it in the 'Index Progress' tab on the left side of the document tree. (last tab with the green icon)
  - 5.1. After all documents have a green check mark by them, the 'Done' button will appear and you may close and validate the batch.

### How to Verify Index Information Imported From a Flat File

- 1. Open the batch in the Index Module. Import index information. Click Here to learn how to import index information from a flat file.
- 2. The first page of the document is displayed in the viewer and the document will be highlighted in the document tree.
- 3. The index information that was automatically captured will be filled into the index fields on the right side panel.
- 4. Verify the index information and make any necessary changes and click the 'Next' button.
- 5. You do not have to click through every single document unless you wish to. Once a document has been indexed via the zone recognition, it will have a green check mark next to it in the 'Index Progress' tab on the left side of the document tree. (last tab with the green icon)
  - 5.1. After all documents have a green check mark by them, the 'Done' button will appear and you may close and validate the batch.

#### How to Manually Create PDF Bookmarks Within Documents

- 1. To manually create PDF bookmarks for documents, process a batch in the Index Module and use the document tree panel on the left.
- 2. Select the document and page number you wish to add a bookmark to in the 'All Files' navigation tab on the left side of the document tree. (first tab with the blue icon)
- 3. Select the bookmark tab on the left side of the document tree. (third tab with the red icon)
- 4. Click the 'Create Bookmark' button
- 5. Name the bookmark
- 6. Repeat steps 2-5 to create more bookmarks within the same document or within other documents.
- 7. Notice that you are able to re-order bookmarks as a table of contents, regardless of the page number they are pointing to, when you have more than one bookmark within the same document.

- 7.1. You cannot move bookmarks to other documents once created.
- 8. To rename a bookmark, right click on the bookmark with the mouse and select 'Rename'
- 9. To assign a bookmark to a different page within the same document, navigate to the new page destination in the 'All Files' document tree tab, then go back to the 'Bookmarks' document tree tab and right click on the bookmark with the mouse and select 'Set Destination'
  - 9.1. You cannot change the destination of a bookmark to a page in a different document than what the original bookmark was assigned to. You can only set the destination to a page within the same document.

Click Here to learn how to automatically create PDF bookmarks from barcodes.

## 4.21.4 Batch Closing Options - Index

While in the Index Module, there are multiple options to close out of the module:

## Suspend

Suspending a batch means it is not yet complete in the Index module, but you need to close the batch at the moment. This will leave the batch in the Index module with a status of "Suspended".

To Suspend a batch in the Index module, use the 'Suspend' easy button, or click the module window 'X' button in the top right corner and select 'Suspend'.

## **Done / Validate**

The 'Done' easy button will close the batch and send it to the next module in the Batch Progression for that Batch Profile.

Validating a batch by clicking the module window 'X' button in the top right corner and selecting 'Validate' will perform the same function as the 'Done' easy button. It will close the batch and send it to the next module in the Batch Progression for that Batch Profile.

### 4.22 Index Verification Module

The Index Verification Module is where the end user(s) perform manual verification entry to be compared and verified with previously added index field values.

**Import Indexes** 

**Indexing Documents** 

## **Batch Closing Options**

### 4.22.1 Import Indexes

How to Import Index Information From Flat Files in the Index Verification Module

Click Here to learn how to import index information from a flat file that was sent for offsite index.

## 4.22.2 Verifiying Indexes

- How to Manually Verify Index Information
  - 1. To use the Index verification n Module, the batch must be fully indexed in the Index Module.
    - 1.1. In the Index Verification Module use the index fields on the right panel. All index fields are blank.
    - 1.2. If the verification process had not been started yet, start with the first document otherwise start with the document after the last verified index information of the document.
    - 1.3. Type all the desired index values for the corresponding document. Click Index
    - 1.3 If all new index field matches the previously indexed values, Capture will continue to the next document. Repeat step 1.3 until batch is fully verified.
    - 1.4 If one or more index fields do not match the previously indexed values, capture will display a window that allow the user to select the desired index value entered by other user(s) or to select the new index value. It will also sequentially prompt the end user for all the index values that does not match and then move to the next document. Repeat step 1.3 until batch is fully verified.

## 4.22.3 Batch Closing Options - Index Verification

While in the Index Verification Module, there are multiple options to close out of the module:

## Suspend

Suspending a batch means it is not yet complete in the Index Verification module, but you need to close the batch at the moment. This will leave the batch in the Index verification module with a status of "Suspended".

To Suspend a batch in the Index Verification module, use the 'Suspend' easy button, or click the module window 'X' button in the top right corner and select 'Suspend'.

## **Done / Validate**

The 'Done' easy button will close the batch and send it to the next module in the Batch Progression for that Batch Profile.

Validating a batch by clicking the module window 'X' button in the top right corner and selecting 'Validate' will perform the same function as the 'Done' easy button. It will close the batch and send it to the next module in the Batch Progression for that Batch Profile.

# 4.23 Offsite Indexing

The Offsite Indexing feature allows you to copy files from Dokmee Capture to a local or network folder to be indexed at a different location or within a different software.

**Offsite Index Settings** 

**Send Batches Offsite for Indexing** 

**Offsite Index Queue** 

**Import Index from Flat Files** 

### 4.23.1 Send Batches Offsite for Indexing

How to Send Files From a Dokmee Capture Batch to a Local or Network Folder for Index
 Processing

From the Quality Control Module:

1. After QC is complete, click the module window 'X' button in the top right corner and select 'Copy for Offsite Indexing and Validate'

- 1.1. Select 'Copy all pages' option if you wish to copy every page of all documents in the batch
- 1.2. Select 'Copy first page...' if you wish to only copy the first page of all documents in the batch

\*The images as well as a sample "ReadytoSend" flat file format will be placed in the "Ready to Index" location specified in the Batch Profile for the current batch, and the batch will be sent to the next step in the Batch Progression. Click Here to learn how to set the image location for the "Ready to Index" files.

Click Here to learn how to copy multiple batches at one time for offsite index.

Click Here to learn how to import index information after offsite index is complete.

### 4.23.2 Offsite Index Queue

The Offsite Index Queue allows you to copy images from multiple batches at one time to send for Offsite Index.

- How to Use the Offsite Index Queue
  - 1. Go to Home Screen
  - 2. Select Offsite Index Queue
  - 3. All batches currently in the Quality Control and Index modules will be listed
  - 4. Select the batches you wish to copy for offsite index and move them to the box on the right with the green arrow button
  - 5. Choose whether to copy only the first page or all pages of each document
  - 6. Click the 'Copy Batches' button

\*The images as well as a sample "ReadytoSend" flat file format will be placed in the "Ready to Index" location specified in the Batch Profile for the current batch, and the batch will be sent to the next step in the Batch Progression. Click Here to learn how to set the image location for the "Ready to Index" files.

#### 4.23.3 Import Index from Flat Files

How to Import Index Information From Offsite Index or From a Flat File

Click Here to learn how to set the "Ready to Import' location for index flat files.

1. Make sure you have a placed an import ready text file into the "Ready to Import" location specified in the Batch Profile for the current batch.

- 1.1. The flat file should be named as "Z[batchname]\_[batchnumber]\_ReadyToSend. txt"
  - 1.1.1. The items within brackets [] are variable items based on batch name and batch number of the current batch
  - 1.1.2. A Sample flat file will be exported with each batch of images to the "Ready to Index" folder when using the Copy for Offsite Index feature in the Quality Control module.
- 1.2. When you open the flat file (.txt file), the first line should contain the Batch Profile Name
- 1.3. Each subsequent line within the text file represents a document in the batch with index information for each index field separated by a pipe and the document name after the last index field separated by a pipe.
- 1.4. Sample flat file format:
  - 1.4.1. Line 1 = [BatchProfileName]
  - 1.4.2. Line 2 = IndexField1Value | IndexField2Value | IndexField3Value | DOCU000#. tif
    - 1.4.2.1. If an index field value is blank, then you would see 2 pipes together in the text file like below:
      - 1.4.2.1.1. Line 2 = IndexField1Value | | IndexField3Value | DOCU000#.tif
- 2. Open the batch you wish to import index information into within the Index Module
- 3. Click the 'Import Indexes' button
- 4. If an import ready flat file matching the current batch is found and is formatted correctly, all index information will be populated to each document and ready for you to review. Click Here to learn how to use the Index Module for verification of index information.

Click Here to learn how to copy batches for offsite index.

### 4.24 QC Index Module

The QC Index Module is where you may perform verification of index information and do special advanced searching and replacing of missed index information.

**QC Index Functions** 

**Batch Closing Options** 

## **QC Index Queue**

## 4.24.1 QC Index Functions

How to a Perform Find and Replace for Index Information Across Multiple Documents

#### From the QC Index Module:

- 1. In the 'Find and Replace' section in the top left corner of the screen, type the value you are looking for into the 'Search for' field and type the value you would like to replace it with into the 'Replace with' field
  - 1.1. Leaving the 'Replace with' value blank will replace the found items with a 9null0 or empty value
- 2. If you would like to do a whole word or phrase search, check the box next to 'Exact Match'. Leaving this unchecked will perform a wildcard search
- 3. Click 'Go'
- 4. The first value found will be highlighted in pink, and a pop-up window will appear with confirmation and options to replace
  - 4.1. To replace only the first instance of the value found (highlighted in pink) and preview the next item found, click the 'Replace' button
  - 4.2. To replace all values found in the entire batch without a preview, click 'Replace All'
  - 4.3. To skip the currently highlighted value without replacing and preview the next item found, click the 'Don't Replace' button
- How to Update an Index Field Value for Multiple Documents at One Time

#### From the QC Index Module:

- Highlight two or more rows in the grid list of documents using the first row selection column by dragging with the mouse or by using the mouse click with the Control or Shift key on the keyboard
- 2. The selected rows will be highlighted blue
- 3. Click the 'Multiple Updates' button in the bottom left corner of the screen
- 4. Select the index field that you wish to update from the drop down list
- 5. Type a value into the text box
- 6. Click the 'Ok' button

- 6.1.If all documents are blank for the selected index field, the new index value will be placed in that field for each document
- 6.2. If any of the documents selected already contain index information in the selected index field, a pop-up window will appear with confirmation and options to select which documents to overwrite the existing index information
  - 6.2.1. To ignore previously entered values and overwrite all for the selected index field for all documents highlighted blue, click the 'Yes to all' button
  - 6.2.2. To update the selected index field for only the document listed on the confirmation message, click the 'Yes' button
  - 6.2.3. To skip the current document listed on the confirmation message and retain the previous typed index value, click the 'No' button
- How to Locate (null) or Empty Index Fields

From the QC Index Module:

- 1. Click the 'Find Empty Index' button in the bottom left corner of the screen
- 2. On the grid list of documents, the text cursor will be placed in the cell of the first empty or blank index field found
- 3. Keep clicking the 'Find Empty Index' button to move to the next empty index field

### 4.24.2 Batch Closing Options - QC Index

While in the QC Index Module, there are 3 options to close out of the module:

#### **Sent to Index Module**

To send a batch back to the Index Module for further indexing, use the 'Index' easy button, or click the module window 'X' button in the top right corner and select 'Send to Index Module'. Both of these options will close the batch and send it back to the Index Module.

## **Done / Validate**

The 'Done' easy button will close the batch and send it to the next module in the Batch Progression for that Batch Profile.

Validating a batch by clicking the module window 'X' button in the top right corner and selecting 'Validate' will perform the same function as the 'Done' easy button. It will close the batch and send it to the next module in the Batch Progression for that Batch Profile.

# Suspend

Suspending a batch means it is not yet complete in the QC Index module, but you need to close the batch at the moment. This will leave the batch in the QC Index module with a status of "Suspended".

To Suspend a batch in the QC Index Module, use the 'Suspend' easy button, or click the module window 'X' button in the top right corner and select 'Suspend'.

### 4.24.3 QC Index Queue

The QC Index Queue opens all batches currently in the QC Index Module and allows you to process multiple batches at a time from one QC Index window without having to go through batches one at a time from Batch Directory.

- How to Use the QC Index Queue
  - 1. Go to Home Screen
  - 2. Select QC Index Queue
  - 3. The QC Index Module will open, and in the top left corner of the screen you will see a list of all batches currently in QC Index
  - 4. The batch you are working on will be highlighted in blue
  - 5. You may perform all functions as you would during QC Index of a single batch. Click Here to learn more about functions available in the QC Index Module.
  - 6. Once the batch selected is completed, use one of the batch closing options and continue with the next batch. Click Here to learn more about the batch closing options in the QC Index module.

# 4.25 Export Module

The Export Module is where you will choose all of the file options and destination for the images being exported out of the system.

Click Here to learn how to run automatic exporting of batches as a background service using the Batch Processing module.

- How to Add Batches to the Export Queue
  - 1. Process a batch from the Batch Directory in the Export Module. That batch will automatically be in the Export Queue.
  - 2. To add multiple batches to the Export queue, select the batches in the 'Batches available' box and move them to the 'Batches in queue' box using the arrow button.

You may add batches from different Batch Profiles to be exported at the same time, but

options will be limited when doing this. To have the full set of options available, you must only export batches from the same profile.

- How to Export to a Local or Network Folder Destination
  - 1. In the 'Destination' section of the Export module, select the 'Network Path' option
  - 2. Browse to the folder you wish to export to
  - 3. If you would like to delete the first page of each document before exporting, check the box next to 'Delete first page'
  - 4. Set the other export options and click 'Export'
- How to Export Directly to Dokmee, Dokmee Web, and Dokmee Cloud
  - 1. In the 'Destination' section of the Export module, select the 'Direct Upload' option
  - 2. Choose the desired Dokmee product from the drop down list
  - 3. Click the 'Settings' button to set the Dokmee options: Note: For this exercise we selected "Dokmee 6":
    - 3.1. On Dokmee Account tab, Select Cloud or Web. Input the Dokmee login information.
    - 3.2. On the Database Selection tab, choose the file cabinet and folder location where the files should be exported to.
    - 3.3. On the Index Mapping tab, map the Dokmee Capture index fields to the Dokmee file cabinet index fields.
  - 4. If you would like to delete the first page of each document before exporting, check the box next to 'Delete first page'
  - 5. Set the other export options and click 'Export'
- How to Setup Automatic Folder Creation Based on Index Field Values
  - 1. In the 'Foldering' section of the Export module, select the 'With foldering' option
  - 2. Choose the index filed(s) that should be used as the folder names
  - 3. If creating more than one folder level, put the index fields in order, top to bottom, that should be used for the folder hierarchy
  - \*When using automatic foldering, the system will first look to see if a folder named by the index field value already exists, and if it does the document will be stored in that folder. If the folder does not yet exist, a new folder named by the index filed value will

be created.

#### How to Create the Filenames Based on Index Field Values

- 1. In the 'File Name' section of the Export module, select the 'Use index fields as filename' option
- 2. Select at least 1 index field that should be used to name the files
- 3. If selecting more than one index field, us the text box in between the fields to enter a value separator, such as a comma, dash, or underscore
- \* File name can be created using up to ten index fields. The field type that can be used to name a file are: Numeric and text, Numeric Only, Select List and Unlimited Characters. Date index field can no be used for file naming.

## Compression type

Dokmee Capture provide different types of compressions base of the file type

The Following Compression types are available for .tiff files

- 1. CCITT G4 compression (Lossless)
- 2. Deflate compression (Lossless)
- 3. JPEG compression (Lossy)
- 4. LZW compression (Lossless)
- 5. Packbits compression (Lossless)

The Following Compression types are available for .pdf files

- 1. Minimal Size
- 2. Small Size
- 3. Medium
- 4. High Quality
- 5. Maximum Quality

<sup>\*</sup> Dokmee capture can not compress the following documents types: PDF/Metadata, JPG, GIF and BMP

## How to Select the Image Format and OCR Options

- 1. In the 'Image Type' section of the Export module, select the file format and the compression
  - 1.1. Single page / Multi page formats: TIF, PDF, PDF/A, PDF/Metadata
  - 1.2. Single page only formats: Single Page Tiff, JPG, GIF, BMP
  - 1.3. Color only formats: JPG, GIF, BMP
- 2. In the 'OCR' section of the Export module, select the 'OCR' option and choose the primary language contained within the documents
  - 2.1. If the documents contain more than one language either on the same page or within the same document, set the secondary language option

### How to Format the Index Data File for Importing Into Other Systems

This option is only available when exporting to a local or network folder destination.

## Simple delimited text file:

- 1. In the Flat File' section of the Export module, select the 'Flat File' option
- 2. Either choose 'comma delimited' or type another delimiter into the 'custom' box
- 3. If the location of the file should be recorded within the flat file, check the box next to 'Include file path'

#### **Customized Export Script:**

- 1. Index file formats and databases can be customized and created by the developers at Office Gemini. Contact us to have us create a customized export script for you.
- 2. In the Flat File' section of the Export module, select the 'Export Script' option, select the program name from the drop down list

### What is the System Info log?

The System Info log provides information about each document exported. This information can be very helpful when trying to track information about what was exported and when.

To include a system info log for the batches being exported:

- 1. Check the box in the 'System Info' section of the export module.
- 2. Select, with the mouse, each item you wish to record in the log.

- 3. The items highlighted blue will be included in the log. If no items are selected, the log will be empty.
- 4. To deselect an item that is highlighted blue, click on the item again with the mouse.
- \*One text file called "SystemInfo.txt" will be recorded for the entire group of batches being exported

## What is the View log?

The View log provides information log about each batch exported. This information can be very helpful when trying to track information about what was exported and when.

To search within the View log a system:

- 1. Type the name of the batch or select the date range.
- 2. A list with current batched exported will show up

To save the current log result to csv format

1. Simply click Save As

#### How to Save an Export Settings Template

- 1. Once all options have been set in the Export module, click the 'Save Template' button.
- 2. All settings will be saved to the Batch Profile. The next time you export batched from that profile, all settings will be pre-filled.
- \*A template may only be saved when all batches being exported belong to the same Batch Profile.

# 4.26 Change Batch Profile

The Switch Batch Profile function allows a Batch to be switched from one Batch Profile to another after it was already created and assigned.

How to Switch the Batch Profile for a Batch

#### **Caution:**

Index information that has been entered into the Batch prior to switching Batch Profiles will be lost.

1. Go to Home Screen

- 2. Select Change Batch Profile
- 3. Select the Batch Profile that you would like to switch the Batch to
- 4. Select the Batch that you wish to switch in the Available Batches list
  - 4.1. The current Batch Profile for that batch will be listed after the pipe (|) next to the Batch Name
- 5. Move the Batch to the Assigned Batches list
- 6. Click Close

\*The batch will be automatically removed from the Previous Batch Profile and added to the new Batch profile.

## 4.27 Restore Batches

The Restore Batches function allows for the re-import of deleted and exported batches for recovery or further processing. Upon Export or Delete of a batch, a folder containing all batch information is created in the respective folder location listed below. Index information and batch integrity is recovered upon restoration.

In order to restore a batch correctly, the Batch Profile that the original batch belonged to must still be in the system and have the same name and the same index fields as it had when the batch was deleted or exported from the system.

## **Exported Batches Folder**

Central Path Main Folder > Exported

#### **Deleted Batches Folder**

Central Path Main Folder > Deleted

- How to Restore Exported Batches
  - 1. Go to Home Screen
  - 2. Select Restore Batches
  - 3. Click Add
  - 4. Browse to the 'Exported' folder of the Central Path.
  - 5. Each batch is contained within a folder. Choose the batch folder to be restored.

- 6. Choose the Module that the batch should be set to.
- 7. One batch may be selected at a time. To select multiple batches, repeat steps 3-6.
- 8. Click Restore

\*When a batch has been restored, you will see "RE" on the batch name. This indicates that the batch has been re-imported along with an increment of number showing the amount of times that the batch has been restored. When a batch is restored, it will be assigned a brand new Batch ID that is different from the Batch ID of the original batch.

#### How to Restore Deleted Batches

- 1. Go to Home Screen
- 2. Select Restore Batches
- 3. Click Add
- 4. Browse to the 'Deleted' folder of the Central Path.
- 5. Each batch is contained within a folder. Choose the batch folder to be restored.
- 6. Choose the Module that the batch should be set to.
- 7. One batch may be selected at a time. To select multiple batches, repeat steps 3-6.
- 8. Click Restore

\*When a batch has been restored, you will see "RE" on the batch name. This indicates that the batch has been re-imported along with an increment of number showing the amount of times that the batch has been restored. When a batch is restored, it will be assigned a brand new Batch ID that is different from the Batch ID of the original batch.

# 4.28 Optimize Database

# What Does the Optimize Database Function Do?

The Optimize Database function of Dokmee Capture is a function that is used to cleanup and compress the SQL database in an effort to increase the speed of the database and to reduce the size of the database.

#### **Re-Index Tables**

Speeds up the data storing and retrieval by rebuilding the indexes by discarding older and outdated metadata and re-sequencing the metadata that is left.

#### **Shrink Database**

Reduces the database size considerably by removing empty data and unused files and information.

## When Should the SQL Database be Optimized?

It is recommended that this is run every 6 months for optimal speed and performance of the system, or if you notice a slow down in the application or if the SQL database size has grown to 500 MB or more.

## **Precautions**

- Users should not be connected to the system and no functions should be running while the Optimize Database function is running. The time of unavailability on the database could run from less than one minute to as much as several minutes, depending upon the size of the database.
- 2. The Optimize Database function will discard all log files, which contains all restore information. Make sure to do a backup of the SQL database before running the Optimize Database function.
- How to Perform Database Optimization

#### **Caution:**

- Users should not be connected to the system and no functions should be running while the Optimize Database function is running. The time of unavailability on the database could run from less than one minute to as much as several minutes, depending upon the size of the database.
- The Optimize Database function will discard all log files, which contains all restore information. Make sure to do a backup of the SQL database before running the Optimize Database function.
- 1. Go to Home Screen
- 2. Select Optimize Database
- 3. Click Yes
- 4. Wait for Database Optimization to Finish
- 5. Click OK

# 4.29 Manage Services

Administrators have full control over the services used in the system. Through the Manage

Services link, you are directed to the Windows Services Manager and are able to access, start, and stop any Windows Service processes that Dokmee Capture uses.

## **Dokmee Capture Windows Services**

## **DCImportService**

Used by Active Import, Batch Processing, and Export modules

- How to Start and Stop Dokmee Capture Services
  - 1. From the Dokmee Capture Home Screen select Manage Services
  - 2. This will open the Windows Services Manager
  - 3. Find the DCImportService
  - 4. By default the service should be turned On.
  - 5. To turn the service Off, right click and select Stop.
  - 6. To turn the service On, right click and select Start.
  - 7. To Restart the service in cases where problems might be occurring, right click and select Restart.

# 5 Getting Started

Magic Indexing(MI) module automate the indexing process. In this section explains the Magic Indexing Process from start to completion. Magic Indexing module is available in Dokmee Capture Standalone and Network edition. MI requires credit in order to process batches

# Magic Indexing (MI) Getting Started

The following describe the general process to get started with Magic Index. Use the following list as a checklist to properly configure Magic Indexing

- 1. Create a Magic Indexing Account
- 2. Sign In using Magic Indexing account
- 3. Create a batch profile
- 4. Create a Magic Indexing Template

- 5. Add Magic Indexing to the batch Progression
- 6. Process a Magic indexing batch
- \* Detailed instructions of each step are shown below

# + Creating an Magic Indexing (MI) Account and Adding Credit

In order to process Magic Indexing Batches for the first time, you will need to purchase characters using BlueSnap, a global payment company. BlueSnap is embedded within Dokmee Capture. After the purchasing, a Magic Indexing account and a BlueSnap account are created.

From Dokmee Capture Home Screen

- 1. Click on Magic Indexing Button
- 2. Click on "Create Account"
- 3. The Create Account window is BlueSnap payment system. It is required that you make a purchase in order to create your account. \*Internet connection must be available in order to make a purchase.
- 4. Under "New Account" enter all the required information (marked with \*) and select "Secure Online Credit Card" as the method of payment and click Next
- 5. Enter your credit card information
- 6. Click "Submit". This process creates a BlueSnap and Magic Indexing Account
- 7. Magic Indexing credentials will be send via email, use this credentials to Sign In to Dokmee Capture Magic Indexing Module. Store your Magic Indexing and BlueSnap Credentials for later use.
- 8. Click on "Return to Sign in"

\*Use the Magic Indexing account to process batches and the BlueSnap Account to view details of your purchase. For security, Office Gemini does no manage blueSnap accounts or does not keep credit card information.

+ Signing In Using Magic Indexing (MI) Account

In order to process Magic Indexing Batches, the MI user will need to be Signed In From Dokmee Capture Home Screen

- 1. Click on Magic Indexing Button
- 2. Enter the Magic Indexing credentials
- 3. Click Sign In. If login with a temporary password, user will be asked to change the password
- + Creating a batch Profile
  - 1. Click here to learn how to create a batch Profile
- Creating a Magic Indexing Template
  - 1. Click here to learn how to create a Magic Indexing Template
- + Adding Magic Indexing to Batch Progression

Magic indexing will need to be added to the batch progression in the batch profile

- 1. Click Here to learn about how to add and remove modules in a batch profile
- Processing a Magic Indexing batch

From Dokmee Capture home screen

- 1. Click on Batch Directory button
- 2. Create a new batch. Use the Batch Profile containing the Magic Indexing settings. Click here to learn how to create a new batch
- 3. Clicking Process to Process the batch
- 4. Scan/Import documents

- 5. Click **Done** when finished scanning or importing documents
- 6. When the MI batch reached the Magic Indexing module, the MI batch will be processed automatically. The batch will be uploaded to a secure server and indexed
  - The expected turn around time to index a full batch is about 3 hours
  - When the batch is sent to Magic Indexing, it can only be canceled if the batch is been uploaded
  - Magic Indexing batches that are in the indexing stage are locked and can not be canceled, meaning the batch can not be moved to any other module
  - A batch in error status (If batch is before indexing process), will be allowed to be changed to a different Module or Status in the Batch Directory
- 7. Once the batch flat file with index information is imported to Dokmee Capture. The batch will be moved to the next available module
- \* For Magic Indexing troubleshooting information click here

# + How to register using Magic Indexing Trial Users

Try Magic Indexing for free by filling the Magic Indexing Trial Users form. Upon registering, the Magic Indexing and a BlueSnap Accounts will be created. After the trial, simply purchase more characters

To open and fill the Dokmee Capture Trial Users do the following

- 1. From the home screen, click on Magic Indexing
- 2. Click "Create Trial User" hyperlink
- 3. Fill All the required information
- 4. Check Mark "I Agree Terms and Conditions" or agree terms and condition by clinking the submit button (varies from Capture version)
- 5. A Magic Indexing account and A blueSnap Account will be created
- 6. Magic Indexing will send an email with a temporary password. The temporary password will be changed upon Login In

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